



**PROGRAM DEVELOPMENT COMMITTEE**  
**MEETING NOTICE/AGENDA**

Posted at [www.scdd.ca.gov](http://www.scdd.ca.gov)

**DATE:** June 3, 2013

**TIME:** 1:00 – 4:00 PM

**LOCATION:** State Council on Developmental Disabilities  
1507 21<sup>st</sup> Street, Suite 210  
Sacramento, CA 95811  
(916) 322-8481

*Pursuant to Government code Sections 11123.1 and 11125(f), individuals with disabilities who require accessible alternative formats of the agenda and related meeting materials and/or auxiliary aids/services to participate in this meeting should contact Kristie Allensworth at (916) 322-8481 or email [kristie.allensworth@scdd.ca.gov](mailto:kristie.allensworth@scdd.ca.gov). Requests must be received by 5:00 pm May 29, 2013.*

**Teleconference Site:**

**Resources for Independent of Central Valley**  
**220 N. Santa Fe Ste. 131**  
**Visalia, CA 93292**  
**(559) 622-9276**

- |                                   |                 |
|-----------------------------------|-----------------|
| <b>1. CALL TO ORDER</b>           | <b>J. Lewis</b> |
| <b>2. ESTABLISHMENT OF QUORUM</b> | <b>J. Lewis</b> |
| <b>3. WELCOME/INTRODUCTIONS</b>   | <b>J. Lewis</b> |

#### **4. PUBLIC COMMENTS**

*This item is for members of the public only to provide an opportunity to comments and/or present Information to the Council on matters **not** on the agenda. Each person will be afforded up to three minutes to speak. Written requests, if any, will be considered first. The Council will provide a public comment period, not to exceed a total of seven minutes, for public comment prior to action on each agenda item.*

#### **5. REVIEW OF MINUTES FOR MARCH 5, 2013 AND APRIL 23, 2013**

**J. Lewis 3**

#### **6. RECOMMENDATION FOR SELF-ADVOCACY SUPPORT GRANT**

**M. Polit 9**

#### **7. RFP CHANGE FOR CYCLE 36 FACILITATION GRANT**

**R. Newton**

#### **8. RFP FOR AREA BOARD MINI GRANTS**

**R. Newton 243**

#### **9. NEXT MEETINGS**

**J. Lewis**

#### **10. ADJOURNMENT**

**J. Lewis**

For additional information regarding this agenda, please contact Kristie  
Allensworth, 1507 21<sup>st</sup> Street, Suite 210, Sacramento, CA 95811,  
(916) 322-8481

# Program Development Committee

Meeting Minutes of March 5, 2013

Sacramento, California

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## **Members Present**

Jennifer Allen  
Jonathan Clarkson  
Molly Kennedy  
Janelle Lewis (Chair)  
Austin Taylor  
Trena Wade

## **Members Absent**

Robin Hansen  
Patty O'Brien

## **Others Present**

Kristie Allensworth, Staff  
Michael Brett, Staff  
Roberta Newton, Staff  
Mary Agnes Nolan, Staff  
Mark Polit, Staff

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### **1. Call to Order**

Janelle Lewis, Chairperson, called the meeting to order at 1:04pm

### **2. Quorum**

A quorum was established.

### **3. Welcome and Introductions**

Those in attendance introduced themselves.

### **4. Public Comments**

No public comments were presented.

### **5. Update on Jay Nolan Community Services Grant Implementation.**

Mark Polit presented that the grant was approved by the Department of General Services on February 7, and the grant implemented on February 8. The project team is off to a running start. Polit has scheduled a site visit in early March.

### **6. Request for Proposals – Self-Advocacy Support Grants**

Roberta Newton and Mark Polit presented the draft RFPs generated by staff, based on input from self-advocates. Self-advocates gave input on the drafting of the RFPs in the following forums: On November 15, 2012, after being advised that the BRC contract was being terminated, the SSAN members spent a full day giving input on the supports needs of the SSAN. Following this meeting, Council staff also met with the Chair and Vice Chair of the SSAN on December 20, 2012 and January 3, 2013. Council staff additionally met with SAAC members on January 15, 2013 and with the EFC self-advocates on February 4 and 5, 2013. Council staff presented the program elements of the draft RFP to a full meeting of the SSAN

on March 1. The PDC was augmented with the Vice Chair of SSAN and the Chair of SAAC for review of the self-advocacy grants.

Due to the time needed for consulting with the self-advocacy leaders, and the lengthy grant process, a new contract cannot be awarded until near the time for a new grant cycle. Therefore, staff recommended issuing RFPs for Grant Cycle 36, which begins on October 1, 2013. Staff recommended issuing two RFPs, so that one organization would not have to manage all the support functions. There will be one RFP for facilitation and attendant services to self-advocates on the Council, SAAC, EFC, and SSAN, not to exceed \$20,000; the other for support to these self-advocates for planning, agenda development, plain language materials, meeting logistics, video production, and technology support; this grant would not exceed \$160,000.

The PDC reviewed the draft RFPs in depth and made several recommendations for changes.

**Molly Kennedy** moved and **Jennifer Allen** seconded to recommend these RFPs for the Council's approval, with the recommended changes.

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<b>MOTION TO ACCEPT:</b> <i>Molly Kennedy</i>	<b>SECONDED:</b> <i>Jennifer Allen</i>	<b>APPROVE:</b> 6	<b>OPPOSE:</b> 0	<b>ABSTAIN:</b> 0
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## 7. Planning for Future Meetings

Topics the PDC will discuss at the April 23 meeting will include the Cycle 36 Area Board grants, a possible statewide grant, and reviewing the Council's grant-making process. **Roberta Newton** explained that in recent years the Area Board grants were not brought to the Council for approval, instead the grants were approved by the Area Boards. The procedure moving forward would be for the Area Boards to make a recommendation to the PDC for the mini-grants, and the PDC recommend to the Council for approval. In the past, each Area Board was allocated different amounts for their grants (\$10,000, \$20,000, \$35,000), depending on the availability of funds. Roberta Newton reviewed the Council's financial position and the effects of the federal sequester. There is a lot of uncertainty around the federal budget next year, but she recommends moving forward with grants planning for now.

An additional meeting was set for May 23, 1-4 PM.

## 8. Adjournment

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<b>MOTION TO ADJOURN:</b> <i>Molly Kennedy</i>	<b>SECONDED:</b> <i>Jennifer Allen</i>	<b>APPROVE:</b> 6	<b>OPPOSE:</b> 0	<b>ABSTAIN:</b> 0
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The meeting was adjourned at 3:47 PM by Chairperson Lewis.





## **Program Development Committee Meeting Minutes April 23, 2013**

### **Members Present**

Janelle Lewis  
Molly Kennedy  
Carmela Garnica  
Jennifer Allen  
Jonathan Clarkson  
Robin Hansen

### **Members Absent**

### **Others Attending**

Roberta Newton  
Thomas Johnson  
Melissa Corral  
Mark Polit  
Sarah VanDyke

#### **1. CALL TO ORDER/ESTABLISHMENT OF QUORUM**

Janelle Lewis, Chairperson, called the meeting to order at 01:03 p.m. and a quorum was established.

#### **2. WELCOME AND INTRODUCTIONS**

Council members and others attending introduced themselves.

#### **3. PUBLIC COMMENTS**

There were no public comments.

#### **4. STATUS AND REVIEW OF AREA BOARD MINI GRANTS FOR CYCLE 35**

Janelle Lewis, Chairperson, reviewed the detail sheet for the Cycle 35 Mini Grants. There was a brief discussion on the quarterly reports submitted by the Area Boards and what members would want included in future reports. It was highlighted that the language of the contracts was somewhat ambiguous, especially as to whether or not Area Board grantees are mandated to submit a quarterly report.

In regards to future improvements, discussion hinged on making progress report language more specific and providing details of how the contracts are tied to the outcomes and progress of program services. It was also suggested that comparing the language of a sample contract

with current report summaries would benefit the process by establishing a contiguous expectation for language formatting.

It was recommended that Area Board staff amend their report summaries to match the contract language by May 23<sup>rd</sup>.

## **5. RECCOMENDATIONS FOR AREA BOARD MINI GRANTS FOR CYCLE 36**

Janelle Lewis reviewed the detail sheet for the Cycle 36 Mini Grants.

Roberta Newton, Interim Executive Director, informed members that in regards to the implementation of the State Plan, Area Boards are currently on the right path and are executing their goals. Community service, transition, transportation, education, and other areas of the State Plan are being met. More importantly, it appears that the new Mini Grants are being instituted to address issues of the State Plan not already met. This is a good sign for progress.

There was discussion on the current budget of the Council and how much money there is available for projects and services. Rough estimates were worked out among the members. The chief question among members was whether to continue allocating funding for Mini Grants. Members discussed the pros and cons of Mini Grants and the services and supports they provide to communities and Area Boards. There was also discussion on whether Area Boards should have flexibility in their grant proposals. Lastly, it was emphasized that the language for Cycle 36 Mini Grants also be clearer.

Ultimately, it was moved/seconded and carried (Garnica/Hansen) to recommend that the Council continue funding Mini Grants in the amount of \$10,000 per Area Board.

## **6. CYCLE 36 STATEWIDE GRANT AND JNCS GRANT EXTENSION**

Janelle Lewis reviewed the summary sheet pertaining to the extension of the JNCS transition grant. There was a brief discussion on the amount of funding available for this grant, its pros and cons, and other issues.

It was moved/seconded and carried (Hansen/Allen) to accept the Staff recommendation that the Council hold \$360,000 for potential funding of the second year of the JNCS grant proposal. Funding for a second year would be contingent on a recommendation by the PDC at the November Council meeting.

## 7. REVIEW OF SCDD GRANT PROCEDURES

Janelle Lewis reviewed the detail sheet pertaining to the grant making procedures.

Members agreed that the Contracts, RFPs, and Area Board quarterly reports all maintain consistent language into the future.

More importantly, committee members decided that staff would score the RFPs. The PDC would then review their scoring and either amend or accept their recommendations.

## 8. NEXT MEETINGS

Members discussed the scheduling for the work of the PDC. The estimated schedule is as follows:

May 15 <sup>th</sup>	Council reviews PDC recommendations
June 3 <sup>rd</sup>	PDC approves standard RFP. The PDC will also recommend Self-Advocacy Support grantees
June 10 <sup>th</sup>	Public announcement Area Board RFPs
July 17 <sup>th</sup>	PDC Report to Council on Self-Advocacy Support Grants recommendation
September 5 <sup>th</sup>	PDC reviews grant recommendations from the Area Board
September 18 <sup>th</sup>	PDC reports to Council (for approval)
September 19 <sup>th</sup> – 29 <sup>th</sup>	Protest Period
September 30 <sup>th</sup>	Award Notification
September 30 <sup>th</sup> – October 31 <sup>st</sup>	Grant Processing
November 1 <sup>st</sup>	Anticipated Start Date of Area Board grants
November 5 <sup>th</sup>	PDC Review JNCS grant for year two recommendation to SCDD
November 14 <sup>th</sup>	PDC reports to Council on JNCS grant

## 9. ADJOURNMENT

Meeting was adjourned at 3:07 p.m.



**DETAIL SHEET**  
**AGENDA ITEM #6**  
**Self-Advocacy Support Grant Selection**

**ISSUE:** Recommendation to Council for selection of recipient of Self-Advocacy Support Grant for Cycle 36.

**SUMMARY:** The Council issued an RFP for the Self Advocacy Support Grant for up to \$160,000 per year. There were 4 responsive proposals. The PDC will select one for funding. As agreed at the April 23 PDC meeting, staff scored the proposals. The PDC will review the proposals themselves and the scoring of the staff, and then select one to recommend to the Council. The PDC agreed that **members will NOT SCORE the proposals themselves**, but use the staff scoring as a guide.

**COUNCIL STRATEGIC PLAN GOALS/OBJECTIVES:**   **Goal #1, Objective 1a)** The Council will promote the stability and expansion of a statewide self-advocacy network through financial and in-kind support, which includes ensuring that local delegates are able to participate effectively in statewide meetings and events. **Goal #1, Objective 1b)** The Council will strengthen existing self-advocacy groups and promote establishment of new groups at the local level. **Goal #8, Objective 8a)** The State Council's Employment First Committee will continue to identify strategies and monitor progress towards implementation of the employment first policy.

**PRIOR COUNCIL ACTIVITY:** Beginning in 1983 with the Council Committee on Consumer Involvement, the Council has been a leader in promoting self-advocacy through grants and direct self-advocacy support. In 1994, the Council adopted a policy on facilitation and support of self-advocates who were members of the Council. Also in the 1990s, the Lanterman Act was revised to require self-advocate membership in the Council. The Council supported the growth of the People First organizations in the state and People First of California. Two years ago the Council establish the Statewide Self-Advocacy Network (SSAN) at which time The Council contracted with Board Resource Center (BRC) to provide SSAN support in planning, leadership development, facilitation, media, and logistics, as well as support to self-advocates on the EFC and SAAC.

Due to irregularities in the grant making process, the self-advocacy support contract with BRC was terminated as of January 4, 2013. The Council committed Council staff to continue basic support for the SSAN, SAAC, and EFC self-advocates until another grant can be awarded. The PDC and

Council staff consulted extensively with self-advocate leaders on the SSAN, SAAC, and EFC in preparing an RFP. On March 20, 2013, the Council approved the RFP for a Self-Advocacy Support Grant for up to \$160,000, for up to two years.

**BACKGROUND:** The self-advocates on SSAN have created a vibrant and ambitious network with broad representation. SSAN consists of representatives from each Area Board, the Council, People First of California, the Department of Developmental Services Consumer Advisory Committee, the UCEDDs, Disability Rights California, and the California Foundation for Independent Living Centers.

**ANALYSIS/DISCUSSION:** In response to the RFP, the Council received 5 proposals, four of which were responsive to the RFP: CAPC, Get Safe, Supported Life Institute (SLI), and Futures Explored. Council Administrative Staff (Kristie Allensworth and Sarah van Dyke) reviewed the submissions against the minimum requirements for the proposal and to ensure all required submissions were included.

Program Staff (Roberta Newton, Mark Polit, and Mary-Agnes Nolan) scored the proposals separately, then discussed the pros and cons of the various proposals and, in some cases, adjusted their scores. The two highest proposals scored essentially equal, CAPC, and Get Safe. The table below shows the total scores for each responsive applicant.

	<b>CAPC</b>	<b>Get Safe</b>	<b>SLI</b>	<b>Futures Explored</b>
<b>Total Score</b>	<b>249</b>	<b>248</b>	<b>217</b>	<b>155</b>

#### **Scoring Criteria Used (from the RFP)**

1. The extent to which the applicant has experience, knowledge, and demonstrates the ability to accomplish what is being proposed (30 points available)
2. The extent to which the budget is reasonable and appropriate for accomplishing the objective of the proposal and maximizes the use of grant resources for delivery of project services. (10 points available)
3. Sound methodology with appropriate timeframes for meeting project goals and objectives; has a timely and reasonable work plan for meeting goals and objectives. (25 points available).
4. Knowledge and ability to deliver high quality educational materials in a variety of formats (20 points available).
5. Ability to use technology effectively (5 points available).
6. An understanding of, commitment to, and the ability to grow the self-advocacy movement (10 points available)

The CAPC proposal was for \$103,822 in year one and \$52,022 in year two. The others were each for close to \$160,000 for one year.

Staff did not reach agreement on which proposal should be funded, but staff agreed that CAPC and Get Safe were the top two submissions.

**STAFF RECOMMENDATION:** Staff recommends awarding the Cycle 36 Self-Advocacy Support Grant to either CAPC or Get Safe.

**ATTACHMENT(S):** (1) Self-Advocacy Support Grant RFP. (2) The four applications that were responsive to the RFP: CAPCI, Get Safe, Supported Life Institute, and Futures Explored.

**PREPARED:** Mark Polit, May 21, 2013





**Self-Advocacy Support Grant  
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## **A) PURPOSE AND DESCRIPTION OF SERVICES**

The purpose of this Request for Proposal (RFP) is to seek qualified proposers to support and advance the self-advocacy activities of the State Council on Developmental Disabilities (SCDD). This includes but is not limited to supporting the activities of the Statewide Self-Advocacy Network (SSAN), the Self-Advocate Advisory Committee (SAAC), the Employment First Committee (EFC) and the Council itself. The State Council on Developmental Disabilities (SCDD) is soliciting proposals that meet all of the criteria set forth in this, RFP.

### **1. Background**

State Councils on Developmental Disabilities are funded by the Administration on Developmental Disabilities (ADD) under federal law 42 USC 15021 SEC. 121 to "engage in advocacy, capacity building, and systemic change activities that contribute to a coordinated, consumer- and family-centered , consumer- and family-directed, comprehensive system of community services, individualized supports, and other forms of assistance that enable individuals with developmental disabilities to exercise self-determination, be independent, be productive, and be integrated and included in all facets of community life."

State Councils on Developmental Disabilities (SCDD) are required to develop 5 year State Plans which identify goals and objectives to enhance and improve upon the quality of life enjoyed by individuals with developmental disabilities. This RFP is intended to fund projects that advance the Council's State Plan goals, as cited below:

#### **California's 2012-2016 State Plan includes the following Goal #1:**

Individuals with developmental disabilities have the information, skills, opportunities and support to advocate for their rights and services and to achieve self-determination, independence, productivity, integration and inclusion in all facets of community life.

Objective 1a) states:

The Council will promote the stability and expansion of a statewide self-advocacy network through financial and in-kind support, which includes ensuring that local delegates are able to participate effectively in statewide meetings and events.

Please refer to the complete State Plan [www.scdd.ca.gov/stateplan.htm](http://www.scdd.ca.gov/stateplan.htm) for additional objectives relating to self-advocacy.

## 2. Program Description

### Definitions

The Contractor will be expected to provide services and supports to the following groups:

#### **SSAN – Statewide Self-Advocacy Network**

SSAN was established in 2012 and is intended to position itself as the statewide developmental disability self-advocacy leadership organization. Currently, SSAN is supported by the SCDD but it is hoped that in the future, SSAN will become a freestanding independent nonprofit organization. It is composed of 22 self-advocates, which include representatives of the Council, the Council's 13 area boards, and related disability organizations. SSA meets quarterly for two day meetings in locations throughout the state. SSAN elects a Chair and Vice Chair who take leadership in planning and carrying out SSAN meetings. SSAN members are encouraged to work closely with and assume leadership roles amongst their local self-advocacy groups.

#### **SAAC – Self-Advocacy Advisory Committee**

SAAC is a Committee of the SCDD. It meets six (6) times a year, on the day before the full Council meeting. SAAC is composed of all self-advocate members of the Council who wish to participate and any other individuals who wish to attend. Typically, SAAC includes 5-7 members. The SAAC reviews and advises the Council on policies and issues of concern to self-advocate. SAAC also serves as a venue where self-advocates review the Council's agenda for the next day meeting so as to better prepare to participate. Council materials may be adapted into plain language and PowerPoint in order to enhance comprehension. For further information on SAAC functions, please refer to the Council's Bylaws [www.scdd.ca.gov/res/docs/Bylaws\\_2012\\_Final.docx](http://www.scdd.ca.gov/res/docs/Bylaws_2012_Final.docx).

#### **EFC – Employment First Committee**

EFC is a Committee of the Council. It is composed of a variety of governmental, nonprofit, and advocacy individuals all of whom have an interest in advancing employment opportunities for people with developmental disabilities. The EFC includes four (4) self-advocates. The EFC meets four (4) times a year. The self-advocates meet prior to each EFC meeting to review the agenda and materials so as to prepare to fully participate and contribute to the meeting.

## 3. Description of Services Sought

### Leadership Coaching

SSAN: Responsible for assisting and consulting with Chair and Vice Chair in developing agenda, meeting plans and follow-up (4 meetings per year)

SAAC: Responsible for assisting and consulting with Chair in developing agenda, Council report, meeting plans and any required follow-up (six meetings per year).

For leadership coaching duties described above, the contractor shall report directly to self-advocates.

### Meeting Logistics

SSAN: in consultation with Chair, Vice Chair and SCDD management, recommend meeting locations, arrange for Audio visual equipment as needed, provide written and alternative materials as needed, assess for and resolve reasonable accommodation needs. Facility arrangements must be approved by and will be paid by the SCDD.

SAAC: Provide written and alternative materials as needed and requested by Chair

EFC: Provide written and alternative materials as needed and requested by Chair

EFC: Provide support and guidance for a time-limited self-advocacy project, designed by the EFC self-advocates, and approved by SCDD. Not to exceed 30 hours.

### Training

SSAN: In consultation with SSAN leadership, develop four training presentations on topics chosen by the SSAN membership including speaker(s), and materials in a variety of formats. Training approach should focus on "Train the Trainer" modality with intended outcome to enhance leadership and presentation skills. Presentations to be made available throughout SCDD organization and local self-advocacy groups.

### Video Products:

Trainings: Upon request of SCDD, two of the trainings discussed above shall be condensed and produced as 15 minute video products with plain language learning guide; for posting on SCDD website.

### Plain Language Materials

SSAN: All materials, including n informational brochure about SSAN suitable for wide distribution

SAAC: Council packet and SAAC materials, as directed by the Chair.

EFC: EFC packet and other materials, as requested by the Self-Advocacy Specialist.

### Technology

Assist self-advocates to learn and utilize technology in order to promote accessible and cost effective communication. Such technology shall include but not be limited to Skype, Adobe Connect or other VOIP; flash drives; wi-fi; webinars, "Go to Meeting", teleconferencing; video, DVDs, web-based formats. Contractor will maintain and keep current a SSAN web site.

### Technical Support to Area Boards and Regions

Contractor will offer up to 50 hours of technical assistance to Area Boards and their SSAN representative. SCDD will determine recipients of technical assistance. Technical assistance to include but not limited to providing outreach materials, guidance on establishing and sustaining self-advocacy groups; advice on presentation modalities and technology.

### Duration of Project

Grants awarded under this RFP Cycle 36 are for one year (October 1, 2013 - September 30, 2014) proposals may be submitted for a two year period, ending September 30, 2015. The Council will evaluate the expenditure of funds and programmatic progress annually. Funding for the second year is subject to the availability of funds and the Council's evaluation of first year progress and outcomes.

## **B) MINIMUM QUALIFICATIONS FOR PROPOSERS**

Proposers shall provide information regarding the qualifications of the proposer and all staff and/or consultants who will contribute to the project. The proposal shall include:

An organizational chart, job descriptions, and qualifications, as applicable, (maximum 5 pages, plus specifically referenced resumes)

A signed cover letter shall be included on company letterhead and attached to the front of the RFP response package. The signature on the cover letter shall be from the lead proposer or a duly authorized party representing the proposer and the proposer's proposal. At a minimum, the cover letter shall include the following statement:

"We have carefully read and understand all the provisions in this RFP and agree to be bound by them. We fully read and reviewed the terms and conditions as stated in the State Contracting Requirements, attached to the RFP, and, that by submitting a response understands that this document represents the agreement that we will be expected to execute if we are successfully awarded a Cycle 35 CPDG from the SCDD." No deviations or exceptions to this statement shall be accepted or permitted.

- ✓ Proven history of partnering with and supporting self-advocates.
- ✓ Proven history of translating materials into Plain language
- ✓ Proven history of developing advocacy/educational presentations with and for self-advocates
- ✓ Thorough knowledge of Open Meeting Laws, and pertinent state and federal laws.

✓

## C) INSTRUCTIONS FOR COMPLETING CPDG PROPOSAL

### 1. Timelines and Submission Information

Proposal Deadline by 5:00 p.m. on	<b>Wednesday, May 1, 2013</b>
Written Question Submittal Deadline no later than	<b>3 pm on April 19, 2013</b>
Council Action to Award Grant(s)	<b>July 17, 2013</b>
Public Notice	<b>July 18, 2013</b>
Protest Period	<b>July 18 - 28, 2013</b>
Award Notification (pending completion of protest period)	<b>July 28, 2013</b>
Anticipated Funding of Awarded Proposals to Begin	<b>October 1, 2013</b>

- ✓ The proposal must be complete and meet all of the requirements set forth in the proposal guidelines.
- ✓ Proposers are responsible for providing accurate, current, and complete information about their organization and proposed program/project.
- ✓ All decisions regarding proposals that are ultimately funded are the sole responsibility of SCDD. Therefore, submission of all required documentation must be submitted and completed in the manner outlined in this proposal packet.
- ✓ SCDD reserves the right to amend guidelines by addendum, but no later than ten days prior to the submission deadline date.
- ✓ Two copy ready applications, including all the required documentation must be received by May 1, 2013 at 5:00 p.m. Any proposals received after Wednesday May 1, 2013 regardless of the postmarked date, will be returned to the proposer, and will not proceed through the evaluation process.
- ✓ SCDD does not accept faxing or e-mailing of any documents pertaining to the completed application.
- ✓ The proposals selected for funding will be at the sole discretion of SCDD.
- ✓ Prior to posting the "Notice of Intent to Award Contracts" and during the protest period all proposals will be designated confidential to the extent permitted by the California Public Records Act. After the protest period ends, all proposals received will be regarded as public record. Any language purporting to render all or any portion of the proposals confidential shall be regarded, as non-effective and the proposal will be rejected.
- ✓ SCDD staff will not provide written or oral debriefings to unsuccessful applicants.

- ✓ The proposal package should be prepared in the least expensive method.
- ✓ All proposals must be submitted under sealed cover and sent to State Council on Developmental Disabilities by dates and times shown in Section C (a), Timelines and Submission Information on page 6.
- ✓ The original proposal must be marked "ORIGINAL COPY". All documents contained in the original proposal package must have original signatures and must be signed by a person who is authorized to bind the proposing firm. All additional proposal sets may contain photocopies of the original package.
- ✓ The proposal envelopes must be plainly marked with the RFP number and title, your firm name and address, and must be marked with "**DO NOT OPEN**", as shown in the following example:

State Council on Developmental Disabilities  
1507 21st Street, Suite 210  
Sacramento, CA 95811  
Attention: Kristie Allensworth  
**DO NOT OPEN**

- ✓ If the proposal is made under a fictitious name or business title, the actual legal name of proposer must be provided.
- ✓ Proposals not submitted under sealed cover and marked as indicated may be rejected.
- ✓ Proposals must be submitted for the performance of all the services described herein. Any deviation from the work specifications will not be considered and will cause a proposal to be rejected.
- ✓ A proposal may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. SCDD may reject any or all proposals and may waive any immaterial deviation in a proposal. SCDD's waiver of immaterial deviation shall in no way modify the RFP or excuse the proposer from full compliance with all requirements.
- ✓ Costs incurred for developing proposals and in anticipation of award of agreement contract are entirely the responsibility of the proposer and shall not be charged to the State of California.
- ✓ An individual who is authorized to bind the proposing firm contractually shall sign the Attachment 2, Proposal/Proposer Certification Sheet, page 27. The signature must indicate the title or position that the individual holds in the firm. Unsigned proposals may be rejected.
- ✓ All proposals are to be complete when submitted. However, an entire proposal may be withdrawn and the Proposer may resubmit a new proposal prior to

Proposal Due Date. Proposal modifications offered in any other manner, oral or written, will not be considered.

- ✓ SCDD may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum to all parties who received a proposal package.
- ✓ SCDD reserves the right to reject all proposals. The agency is not required to award an agreement
- ✓ Before submitting a proposal, proposers should review, correct all errors and confirm compliance with the RFP requirements.
- ✓ Where applicable, proposer should carefully examine work sites and specifications. No additions or increases to the agreement amount will be made due to a lack of careful examination of work sites and specifications.
- ✓ SCDD does not accept alternate contract language from a prospective contractor. A proposal with such language will be considered a counter proposal and will be rejected. The State's General Terms and Conditions (GTC) are not negotiable.
- ✓ No oral understanding or agreement shall be binding on either party.

## **2. Electronic Questions and Answers for this RFP**

For the purpose of discussing questions or concerns regarding this RFP, e-mails may be sent to Kristie Allensworth, any time before and up April 19, 2013. Send your e-mails to [kristie.allensworth@scdd.ca.gov](mailto:kristie.allensworth@scdd.ca.gov). In order to ensure fairness, all questions regarding this RFP will be shared via e-mail with each person, agency or organization requesting RFP packets. Answers to questions will be sent to prospective proposers on or before April 24, 2013. Persons requesting RFPs shall provide their email address at the time of their request to Kristie Allensworth in order to ensure receipt of all questions and responses.

## **D) FUNDING OF PROJECTS**

SCDD has available a maximum of \$160,000 for this grant.

Funding is contingent on the SCDD's receipt of sufficient federal funds. After the announcement of a grant award, changes in the level of federal appropriations received by SCDD may result in the reduction of funds or withdrawal of some or all funded proposals. SCDD assumes no responsibility for costs incurred by the applicant for the completion or submission of a proposal.

SCDD reserves the right to accept or reject any or all proposals received as a result of the request, to negotiate with any qualified entity, or to modify or cancel, in part, or in its entirety, these guidelines if it is in the best interest of SCDD to do so.



SCDD may reduce the allocation request in any proposal. If the proposal amount is reduced, the applicant will be asked if they would like to proceed with the process. If applicant wishes to proceed, a revised budget will be required with the new allocation amount.

Successful grantees will submit all invoices in arrears. Prior to executing the contract, successful grantees must be able to provide assurances that they are financially able to meet expenditures until approved reimbursement is received.

## **E) REQUIREMENTS FOR PROJECT SUBMISSION**

### Components of Submission

- ✓ Cover Letter, Cover Page and Table of Contents
- ✓ All proposals shall contain a cover letter, as specified on page 6 and a cover/title page.
- ✓ A table of contents is required and shall include all sections identified with all pages clearly and consecutively numbered.

### Statement of Purpose/Overall Approach

In no more than two double-spaced, typewritten pages (12-point Arial font), the proposer shall describe its understanding of the scope of the RFP and the overall approach to carrying out the provisions. Include a brief description of proposer's organization, the program services to be provided, and the methods proposed to meet and evaluate program services.

### Proposal Narrative

The narrative must include:

- ✓ A detailed work plan indicating all tasks and works to be completed and time lines for all major activities.
- ✓ Measurable goals, objectives, implementation strategies, and anticipated outcomes.
- ✓ Identification of any related agencies/organizations the grantee will work collaboratively with and the respective roles of each.
- ✓ An outcome-oriented evaluation plan that is consistent with the goals and objectives of the project.

### Letters of Support

Attach a minimum of three (3) letters of support from three different entities. Proposers are urged to obtain letters of support from any collaborators working on the project. Each letter shall identify the company/individual's name, address and state the contact person with the telephone number. Letters of support received from entities that will financially benefit from the grant funding of this project shall not be counted toward the required three letters of support. SCDD members, state

departments that have appointed members on SCDD, SCDD Headquarters' and Area Board staff are ineligible to write letters of support.

### Organizational Chart

Provide an organizational chart for the proposed program only. List the names and positions of the personnel listed in your budget. The organizational chart does not need to include the entire agency or institution and:

- ✓ Curricula Vitae, Duty Statement, Current Licenses and Credentials where available, provide curricula vitae for each staff person that will be working of the proposal; if staff has not been hired yet, provide duty statements.
- ✓ Cost Proposal Worksheet (Project Budget)(see Attachment #3)
- ✓ Develop a line item budget for the project. For each itemized category, specify the total project costs and a description of each expense.
- ✓ Grant recipients are not required to provide an in-kind match, but are encouraged to do so. In-kind funds are to be identified in the column marked "Other Funds."
- ✓ Indirect costs are to be capped at no more than 12% of project's total budget
- ✓ Previous grants/awards
- ✓ List all grants/awards received from other entities in the last two years that benefit individuals with developmental disabilities. This should include the name of project, the funding source, contact person, telephone number and the amount of the grant/award. Attachments #1 - # 5 (see page 26)

## **F) ADDITIONAL PROPOSAL INFORMATION**

### Disposition of Proposals

Upon proposal opening, all documents submitted in response to this RFP will become the property of the State of California, and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public. Proposal packages may be returned only at the proposer's expense, unless such expense is waived by SCDD.

### Agreement Execution and Performance

Service shall start not later than 60 days, or on the express date set by SCDD and the Contractor, after all approvals have been obtained and the agreement is fully executed. Should the Contractor fail to commence work at the agreed upon time, SCDD, upon five(5) days written notice to the Contractor, reserves the right to terminate the agreement. In addition, the Contractor shall be liable to the State for the difference between Contractor's Proposal price and the actual cost of performing work by another contractor.

### Verification of Proper Information

By submitting a proposal, proposers agree to authorize SCDD to:

- ✓ Verify any and all claims made by the proposer including, but not limited to verification of prior experience and the possession of other qualification requirements; and
- ✓ Check any reference identified by a proposer or other resources known by SCDD to confirm the proposer's business integrity and history of providing effective, efficient and timely services.

Proposals that contain false or misleading statements, or provide references, that do not support a claim by the proposer, may be rejected. If a proposer's claims on the Required Attachment/Certification Checklist cannot be verified to SCDD's satisfaction, the proposal will be deemed nonresponsive and rejected from further consideration.

### SCDD rights

In addition to the rights discussed elsewhere in this RFP, SCDD reserves the following rights:

### RFP Changes

SCDD reserves the right to do any of the following up to the proposal submission deadline:

- ✓ Modify any date or deadline appearing in this RFP or the RFP Time
- ✓ Schedule.
- ✓ Issue clarification notices, Addenda, alternate RFP instructions, forms, etc.
- ✓ Waive any RFP requirement or instructions for all proposers if SCDD determines that the requirement or instruction was unnecessary, erroneous or unreasonable.
- ✓ Allow proposers to submit questions about any RFP change, correction or Addenda. If SCDD allows such questions, specific instructions will appear in the cover letter accompanying the document.

### Collect Information from Proposers

If deemed necessary, SCDD may request a proposer to submit additional documentation during or after the proposal review and evaluation process. SCDD will advise proposers orally, by fax, email, or in writing of the documentation that is required and the time line for submitting the documentation. SCDD will follow-up oral instructions in writing by fax, email, or mail. Failure to submit the required documentation by the date and time indicated may cause SCDD to deem a proposal nonresponsive.

SCDD, at its sole discretion, reserves the right to collect, by mail, email, fax or other method; the following omitted documentation and/or additional information:

1. Signed copies of any form submitted without a signature.
2. Data or documentation omitted from any submitted RFP attachment form.
3. Information/material needed to clarify or confirm certifications or claims made by a proposer.
4. Information/material or form needed to correct or remedy an immaterial defect in a proposal.

The collection of proposer documentation may cause SCDD to extend the date for posting the Notice of Intent to Award. If SCDD changes the posting date, SCDD will advise the proposers, orally, via email, or in writing, of the alternate posting date.

#### Right to Remedy Errors

SCDD reserves the right to remedy errors caused by:

- ✓ SCDD office equipment malfunctions or negligence by agency staff,
- ✓ Natural disasters (i.e., floods, fires, earthquakes, etc.).
- ✓ Any other catastrophic event beyond SCDD's control.
- ✓ Waive any RFP requirement or instruction for proposers if SCDD determines that the requirement or instruction was unnecessary, erroneous or unreasonable.

#### No contract award or RFP cancellation

The issuance of this RFP does not constitute a commitment by SCDD to award a contract. SCDD reserves the right to reject all proposals and to cancel this RFP if it is in the best interests of SCDD to do so.

#### Contract amendments after award

The SCDD reserves the right to amend the contract after SCDD makes a contract award.

#### Staffing changes after contract award

SCDD reserves the right to approve or disapprove changes in key personnel that occur after SCDD awards the contract.

#### Withdrawal and/or Resubmission of Proposals

A proposer may withdraw a proposal at any time before the proposal submission deadline.

### Submitting a withdrawal request

Submit a written withdrawal request, signed by an authorized representative of the proposer. An originally signed withdrawal request is generally required before SCDD will return a proposal to a proposer. SCDD may grant an exception if the proposer informs SCDD that a new or replacement proposal will immediately follow the withdrawal.

### Resubmitting a proposal

After withdrawing a proposal, proposers may resubmit a new proposal according to the proposal submission instructions. Replacement proposals must be received at the stated place of delivery by the proposal due date and time.

## **G) PROPOSAL REVIEW AND EVALUATION CRITERIA**

At the time of proposal opening, each proposal will be checked for the presence or absence of required information in conformance with the submission requirements of this RFP.

Proposals that are incomplete or contain false or misleading statements will be rejected.

The proposals that meet the minimum qualifications will be evaluated and scored according to the criteria indicated below. A minimum of 85 points must be achieved in this phase to be considered responsive. (A responsive proposal is one which meets or exceeds the requirements stated in this RFP.)

### Criteria for Program Evaluation

A scoring system will be used during the program evaluation process to rank proposals. A maximum total of 100 points per reviewer will be awarded based on the following criteria:

A scoring system will be used during the program evaluation process to rank proposals. A maximum total of 100 points per reviewer will be awarded based on the following criteria:

1. Extent to which the applicant has experience, knowledge, and demonstrates the ability to accomplish what is being proposed (30 points);
2. Demonstrates sound methodology with appropriate timeframes for meeting project goals and objectives. Has a timely and reasonable work plan for meeting goals and objectives (25 points);
3. Extent to which proposer demonstrates knowledge and ability to deliver high quality educational materials in a variety of formats(20 points)
4. Extend to which proposer demonstrates ability use technology effectively (5 points)
5. Extent to which proposer demonstrates a commitment and the ability to grow the self-advocacy movement in California (10 points)
6. Extent to which the budget is reasonable and appropriate for accomplishing the objectives of the proposal (10 points) ;

## **H) AWARD AND PROTEST**

Notice of the proposed award shall be posted in the lobby of SCDD, located at 1507 21st Street, Suite 210, Sacramento, CA 95811, for 5 working days prior to awarding the agreement.

If any proposer, prior to the award of agreement, files a protest with SCDD at 1507 21st Street, Suite 210, Sacramento, CA 95814, on the grounds that the (protesting) proposer would have been awarded the contract had the agency correctly applied the evaluation standard in the RFP, or if the agency followed the evaluation and scoring methods in the RFP, the agreement shall not be awarded until either the protest has been withdrawn or SCDD has decided the matter. It is recommended that any protest be submitted by certified or registered mail.

Upon resolution of the protest and award of the agreement, the contractor must complete and submit to the awarding agency the Payee Data Record (STD 204), to determine if the contractor is subject to state income tax withholding pursuant to California Revenue and Taxation Code Sections 18662 and 26131. This form can be found on the Internet at [www.osp.dgs.ca.gov](http://www.osp.dgs.ca.gov) under the heading FORMS MANAGEMENT CENTER. No payment shall be made unless a completed STD 204 has been returned to the awarding agency.

Upon resolution of the protest and award of the agreement, Contractor must sign and submit to the awarding agency, page one (1) of the Contractor Certification Clauses (CCC), which can be found on the Internet at [www.dgs.ca.gov/contracts](http://www.dgs.ca.gov/contracts).

## **I) ALLOWABLE AND NON-ALLOWABLE CPDG GRANT COSTS**

The purpose of the CPDG program is to provide resources necessary to initiate new programs that are creative, needed and innovative for people with developmental disabilities and their families. These funds may not be used to purchase goods or services for which another funding source is available, or to supplant existing funding. Proposal budgets should include all necessary expenses for the applicant to complete their project/program.

Each line item in the budget will be reviewed by SCDD to determine whether it is allowable and reasonable. SCDD reserves the right to request a revised budget. The following list contains examples of allowable and non-allowable CPDG contract expenditures.

- ✓ Funds cannot be used to purchase real property.
- ✓ Funds cannot be used to purchase childcare vouchers
- ✓ Funds may be used to modify facilities to meet fire and life safety requirements of the Fire Marshall and/or the local licensing agency. The applicant will be required to submit three bids for any facility modifications.

Rent for an office and/or facility is a reimbursable expense, as long as staff funded through the grant is working from the office/facility. The rent should not exceed the rental rates for an equivalent size facility in the geographical area.

Any equipment purchased from funds under the terms of this contract is the property of the State Council on Developmental Disabilities. For purposes of CPDG, equipment is considered any item purchased by the contractor that has a unit acquisition cost of at least \$1,000 or a normal useful life of at least three years. The contract must include a detailed inventory of any equipment purchased with CPDG funds. The contractor shall provide a final project equipment inventory to SCDD. This inventory list must accompany the project's final progress report and is due within 45 days of the end of the contract.

A written request to purchase equipment is required by the contractor prior to reimbursement for any articles, supplies or equipment exceeding \$1,000 in cost. A written justification request, including the purpose for the purchase and reasonableness of the cost is required prior to authorizing purchases.

Equipment may be leased; however, it may not be leased with an option to purchase. The contractor shall provide SCDD with copies of lease agreements for equipment leased during the contract period.

Examples of equipment that may not be purchased or purchased only with prior approval include:

- ✓ Motor vehicles may not be purchased. They may be leased during the contract period.
- ✓ Computers may only be purchased with prior approval from SCDD.
- ✓ Fax machines, VCR, camcorders, and digital cameras may only be purchased with prior approval from SCDD
- ✓ Copy machines may not be purchased. However, they may be leased during the contract period.
- ✓ Wall-to-wall carpeting is non-allowable. However, area rugs may be purchased.
- ✓ Any equipment item that is attached to a facility or vehicle, which cannot be removed in usable condition of the facility or vehicle ease to serve persons with developmental disabilities is non-allowable.
- ✓ As a general rule, it can be assumed that equipment with a value under \$1000 will be amortized and no longer property of the State after three years.
- ✓ For purposes of CPDG, equipment item costs must be considered in terms of the end usable product, e.g., a bed is considered the sum of the cost of the mattress, box springs and frame. Applicants should contact SCDD on specific issues concerning items over \$1000.
- ✓ Funds cannot be used for modifications that are solely aesthetic in nature or are not necessary to meet fire and life safety requirements.
- ✓ CPDG funds shall not be used to purchase food for participants at CPDG sponsored conferences, trainings, seminars or workshops, however can be used for registration fees.

## **Supplies:**

- ✓ Only reasonable, necessary, and allowable costs incurred for "supplies to carry out this contract agreement may be billed to SCDD in accordance with the contract agreement and applicable federal regulation cost principles, subject to the non-allowable items listed on pages 10-11.
- ✓ General office supplies (e.g., paper, pens, etc.) must be purchased only in amounts reasonably expected to be utilized during the term of and in the performance of the contract agreement.
- ✓ Title to all supplies rest with the contractor upon acquisition. All supplies used shall not be included as depreciable equipment/property.
- ✓ The contractor must properly account for the supply items purchased with federal funds regarding the usage and disposition of inventory requirements as applicable to their organization. (34 CFR 74.35 or 34 CFR 80.33)
- ✓ For any purchase of a supply item with a useful life of more than one year (i.e., computers, printers, laptops, software, fax machines), the following shall be provided:
  - ✓ A general description of the purchase or expected purchase must be written in the budget narrative, to include an explanation to why items are necessary for the provisions of services in the contract. Note: Prior authorization is required for any purchase order exceeding \$2,500 subject to the necessity or desirability of incurring such cost. (SCM 3.17.2 D)
  - ✓ If the supply item is initially budgeted in the contract agreement, the purchase should occur as soon as possible so that item can be used effectively during the term of the contract agreement.
  - ✓ If the supply item is used for multiple programs, the contractor must determine an appropriate allocation of the purchase cost billable to the contract agreement based on the usage between the programs.
  - ✓ If the supply item did not initially get budgeted into the current contract agreement, the budget narrative must be amended to include the supply item being purchased and submitted as a contract amendment for approval to the SCDD contract officer.

## **Travel and Per Diem Rates Information**

If your proposal has a travel and/or mileage line item, you must be knowledgeable on the contract terms regarding travel and per diem. All travel expenses and per diem rates paid to its employees for expenses incurred for contract services can only be reimbursed by SCDD for actual costs not to exceed the Department of Personnel Administration (DPA) designated rates. Further, no expense for travel outside of the State of California shall be reimbursed.

The State's travel and per diem rates may change periodically; therefore, these rates will not be specifically identified in the contract. To obtain the most current travel and per diem rates go to the DPA website at <http://www.dpa.ca.gov/jobinfo/statetravel.shtml>

If the organization's travel and per diem rates exceed the DPA rates, the contractor must compute the allowable Travel and/or Mileage costs using the DPA rates in order to identify the expenses to invoice SCDD. The computation worksheet must be retained to support the invoiced expenses.



To facilitate consistent processing within your organization's internal control policies, contract staff should utilize existing travel/mileage claim forms approved for use by all organization employees. To support the travel/per diem expenses submitted to SCDD under the contract, the expenses must be properly supported by documentation that includes at least the following elements:

- ✓ Basic travel/mileage claim information and supporting receipts (dates of travel, destination, mileage, meal costs, airfare costs, etc.) in accordance with your organization's travel policies and procedures.
- ✓ Sufficient adequate detail of travel purpose which supports reimbursements for the performance of services as defined in the contract scope of work, including the contract service and a listing of the specific consumers and/or other/additional information, as applicable, for which the travel or mileage expenses were incurred (either on the travel/mileage claim form or an alternative supporting document that is maintained separate from the travel claim by the program administrator).
- ✓ Travel and/or mileage costs invoiced to SCDD must be consistent with the organization's travel policy and/or DPA rates, and submitted on the correct contract budget line item consistent with above requirements
- ✓ Documentation of the allocation of travel/mileage costs to the appropriate programs/funding sources in the accounting records.
- ✓ Consultants' rates must conform to 1) the Schedule of Maximum Allowances for positions covered by that schedule; 2) comparable state civil service positions; or if the above are not applicable, 3) to the going rate for similar work outside state service.
- ✓ Costs related to disseminating information about project outcomes can only be included in the funding request if this expense is to be incurred during the term of the contract period.
- ✓ No staff person can be committed to more than 100% of that person's time. SCDD reserves the right to verify and determine reasonableness of staff time committed to other jobs/projects.
- ✓ Code of Federal Regulations cost principles also includes additional non-allowable expenses that may not be included in this section.

## **J) CPDG/STATE CONTRACTING REQUIREMENTS/PROVISIONS**

This section contains the standard agreement language that pertain to services and budgetary/payment provision requirements in the CPDG contract. Provisions in the contract are subject to change.

### Scope of Work - Contractor agrees to do the following:

- ✓ Provide SCDD with the services as described in the proposal.
- ✓ Work and cooperate with SCDD on dissemination/project replication.
- ✓ Monitor and report all fiscal expenditures and program activities to ensure contract compliance.
- ✓ Invoicing and Payment - The maximum amount payable under this agreement shall not exceed the amount awarded by SCDD. The contract language shall include the

contract amount, the services that will be provided, and the dates the contract's beginning and ending dates.

- ✓ For services satisfactorily rendered, and upon receipt and approval of the invoice(s), and progress and outcome report(s) for the period covered, SCDD agrees to reimburse the Contractor for said services in accordance with Attachment 5, Budget.
- ✓ Invoices shall be submitted on the Invoice Form provided by SCDD. All invoices
- ✓ must be submitted with a progress report. Invoices shall be submitted not more frequently than monthly or less than quarterly in arrears to:

Kristie Allensworth

California State Council on Developmental

1507 21st Street, Suite 210

Sacramento, CA 95811

- ✓ Progress reports are to be submitted using the SCDD web-based reporting program, DD Suite and must be current for SCDD to process an invoice. SCDD will provide the contractor with access to DD Suite. SCDD will not process the final invoice until all Progress and Outcome reports, and items/products listed in the contract have been received by SCDD.

#### State Budget Contingency Clause

It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this contract does not appropriate sufficient funds for the program, this contract shall be of no further force and effect. In this event, SCDD shall have no liability to pay any funds whatsoever to Contractor or to furnish any other considerations under this contract and Contractor shall not be obligated to perform any provisions of this contract.

If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, SCDD shall have the option to either cancel this contract with no liability occurring to SCDD, or offer a contract amendment to Contractor to reflect the reduced amount.

#### Contracts with Federal Funds

It is mutually understood between the parties that this contract may have been written before ascertaining the availability of Congressional appropriation of funds, for the mutual benefit of both parties, in order to avoid program and fiscal delays which would occur if the contract were executed after that determination was made.

This contract is valid and enforceable only if the United States Government makes sufficient funds available to SCDD, for the term of this contract and for the purposes of

this proposal. In addition, this contract is subject to any additional restrictions, limitations, or conditions enacted by the Congress or any statute enacted by the Congress which may affect the provisions, terms, or funding of this contract in any manner.

It is mutually agreed that if the Congress does not appropriate sufficient funds for the program, this contract shall be amended to reflect any reduction in funds.

By notification in writing, either party has the option to void the contract under the 30-day cancellation clause or amend the contract to reflect any reduction of funds.

#### Prompt Payment Clause

Payment will be made in accordance with, and within the time specified in, Government Code Chapter 4.5, commencing with Section 927.

#### Review

SCDD or acting agent reserves the right to review service levels and billing procedures as they impact charges against this contract.

#### Final Billing

Final billing, reports, and products for services must be received by SCDD within 45 days following the end of the contract.

#### Funding Source

Contractor agrees it shall not bill any other funding source for the services provided to consumers funded under this contract.

#### Contract Budget Changes

Contractor shall request in writing to SCDD all proposed transfers between individual line items and additions or deletions of line items. Such requests shall contain an explanation of the need for the changes, identification of the line items to be changed and a revised Budget. Any changes cannot be made prior to SCDD written approval. SCDD reserves the right to deny any request for line item transfers, additions or deletions. Contractor understands that in no event shall the maximum amount payable exceed the maximum amount specified in this contract. The program element of the contract is approved by SCDD, any budget changes request that will change the program element will not be approved.

#### Expenditure Restrictions

Notwithstanding any terms to the contrary, no provision of the contract shall be interpreted to authorize expenditures or reimbursements for items not strictly in conformance with appropriate state or federal guidelines.

Department of General Services requires that SCDD provide "Exhibit C. General Terms and Conditions" language to be included as part of the Standard Agreement contract. Proposers must review this document to ensure that they will be able to

comply with the requirements. The exhibit is available on the Internet at [www.dgs.ca.gov/contracts](http://www.dgs.ca.gov/contracts) and may be downloaded and printed for your files. If you do not have Internet capabilities, please contact SCDD for a hard copy of the document.

### Dispute Provisions

If the contractor disputes a decision of the Contract Manager regarding the performance of this contract or on other issues for which the Contract Manager is authorized, by this contract, to make a binding decision, the contractor shall provide written dispute notice to Contract Manager within fifteen (15) calendar days after the date of the action.

The written dispute notice shall contain the following information:

The decision under dispute; The reason(s) contractor disputes the decision of the Contract Manager (if applicable, reference pertinent contract provisions); Identification of all documents and substance of all oral communication which support contractor's position; and the dollar amount in dispute, if applicable.

Upon receipt of the written dispute notice, SCDD's Executive Director will examine the matter and issue a written decision to the contractor within twenty (20) working days. The decision of the Executive Director shall contain the following information:

- a) A description of the dispute;
- b) A reference to pertinent contract provisions, if applicable;
- c) A statement of the factual areas of agreement or disagreement;
- d) Proposal a possible resolution to the dispute; and
- e) Provide a final decision regarding the dispute.

The decision of SCDD's Executive Director shall be final unless, within thirty - (30) calendar days from the date of receipt of the decision, the contractor files with the California State Council on Developmental Disabilities a notice of appeal, in accordance with Title 1, California Code of Regulations, Section 251, et. Seq., and addressed to:

Attention: Chairperson, Executive Committee California State Council on Developmental Disabilities 1507 21st -street, Suite 210  
Sacramento, CA 95811

Pending resolution of any dispute, the contractor shall diligently continue all contract work and comply with all of the representative's orders and directions. The decision of SCDD or its designee shall be final.

### Termination of Contract

The contract may be terminated with or/without cause by SCDD or the contractor, upon providing a 30-day written notice to the other party. If the contract is terminated prior to completion any/all equipment purchased through this contract will be returned to SCDD.

### Debarment and Suspension

For federally funded contracts in the amount of \$100,000 or more, the contractor agrees to certify that he/she and their principals are not debarred or suspended from federal financial assistance programs and activities. The contractor agrees to sign and return to SCDD the "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Transactions." If applicable, a copy of this form is being forwarded to the Contractor with this contract. (Executive Order 12549, 7 CFR Part 3017, 45 CFR Part 76, and 44 CFR Part 17).

### Certification Regarding Lobbying

For contracts with contractors who are State entities not under the authority of the Governor, or cities, private firms or agencies that are receiving in excess of \$100,000 in federal funds from SCDD to perform services, the contractor agrees to sign and submit to SCDD the 'Certification Regarding Lobbying' form with this contract. (Section 1352, Title 31 of the U.S. Code).

### Patents and Copyrights

The contractor agrees that any and all products or any other object or deliverable produced under this contract are the property of SCDD. Reproduction of these products, objects, or deliverables cannot be made without the express written approval of SCDD. Credit for these deliverables will be acknowledged as follows: "This Product was made possible by funding from the California State Council on Developmental Disabilities awarded to (insert provider's name) Copyright California State Council on Developmental Disabilities. All Rights Reserved." Anything produced pursuant to this contract that may be patented or copyrighted is the sole property of SCDD whether or not a patent or copyright is applied for or received by any other party or person.

### Subcontractors

If contractor proposes to subcontract, any services required under this contract, the contractor shall submit any such proposal/MOU/contracts to the Contract Manager for review and written approval prior to initiation of the work by the subcontractor. Notwithstanding any subcontracting permitted by SCDD, the contractor shall be solely liable for any failure of performance required by this contract. All subcontractors shall be required by contractor to meet or exceed any and all provisions of this contract.

### Insurance Requirements

Prior to the contract approval, the contractor, other than a self-insured public entity, shall furnish to SCDD, Certificate(s) of Insurance stating that there is liability insurance presently in effect covering all of contract's activities under this contract as appropriate of not less than \$1,000,000 per occurrence. The Certificate of Insurance will provide that:

The insurer will not cancel the insured's coverage without thirty-day (30) prior written notice to SCDD. SCDD, the Federal Administration on Developmental Disabilities, its officers, employees, and agents are included as additional named insurers, but only insofar as the operations under this contract are concerned.

Contractor agrees that the liability insurance herein provided for shall be in effect at all times during the term of this contract. In the event said insurance coverage expires at any time or times during the term of this contract, the contractor agrees to provide at least thirty (30) days prior to said expiration date a new Certificate of Insurance evidencing insurance coverage as provided herein for not less than one (1) year. In the event the contractor fails to keep in effect at all times insurance coverage as herein provided, SCDD may, in addition to any other remedies it may have, terminate this contract upon the occurrence of such event. The contractor expressly agrees that it shall carry all other forms of insurance as appropriate to its operations or as required by law, such as but not limited to Workers' Compensation Insurance.

### Reporting Requirements

Contractor shall agree to the following reporting requirements:

Submission of written monthly or quarterly progress reports using DD Suite. These reports shall include, but not be limited to: whether the project is on schedule, address issues related to project operations and supervision, and afford opportunities for airing difficulties or special problems encountered so that remedies can be developed quickly. SCDD reserves the right to withhold payment on invoices submitted until an acceptable report is received;

Submission of a written final report in a format and manner prescribed by SCDD, within 45 days after contract completion or termination. This final report shall include but not be limited to a camera-ready or master copy of any materials covered under Item 7 developed in the performance of this contract and shall be comprehensive and include problems and solutions encountered during the contract term; and submission of other reports as may be required by SCDD.

### Project Change

Contractor shall immediately notify SCDD when any part of the contract becomes inoperative or requires change(s). Contractor may submit a written request to SCDD for a change(s) in the project, but shall not implement any changes prior to written SCDD approval in accordance with this contract, state laws, federal laws,

policies, and procedures including the approval of the Department of General Services if required. Such request shall include, but not be limited to, a complete justification and description of how the change(s) will affect the program as outlined in the contract and the intended outcomes. SCDD reserves the right to deny any such request for change(s). Under no circumstances can the budget changes exceed the total amount of the contract authorized by SCDD.

#### Project Evaluation

Evaluation of the project shall be in accordance with procedures established by SCDD.

#### Software Certification

If applicable, Contractor certifies that it has appropriate systems and controls in place to ensure that state funds will not be used in the performance of this contract for the acquisition, operation, or maintenance of computer software in violation of copyright laws.

### **K) RESTRICTIONS ON OUTSIDE EMPLOYMENT OF STATE EMPLOYEES**

#### Current State Employees

No officer or employee in the state civil service or other appointed state official shall engage in any employment, activity, or enterprise from which the officer or employee receives compensation or in which the officer or employee has a financial interest and which is sponsored and/or funded by any state agency or department through or by a state contract unless the employment, activity, or enterprise is required as a condition of other officer's or employee's regular state employment. No officer or employee in the state civil service shall contract on his or her own individual behalf as an independent contractor with any state agency to provide services or goods. (Public Contract Code 10411)

#### Former State Employees

No retired, dismissed, separated, or formerly employed person of any state agency or department employed under the state civil service or otherwise appointed to serve in state government may enter into a contract in which he or she is engaged in any of the negotiations, transactions, planning, arrangements, or any part of decision-making relevant to the contract while employed in any capacity by any state agency or department. The prohibition of this subdivision shall apply to a person only during the two-year period beginning on the date the person left state employment.

For a period of 12 months following the date of his or her retirement, dismissal, or separation from state service, no person employed under state civil service or otherwise appointed to serve in state government may enter into a contract with any state agency, if he or she was employed by that state agency in a policy-making position in the same general subject area as the proposed contract within the 12-

month period prior to his or her retirement, dismissal, or separation. The prohibition of this subdivision shall not apply to a contract requiring the person's services as an expert witness in a civil case or to a contract for the continuation of an attorney's services on a matter he or she was involved with prior to leaving state service. (Public Contract Code 10411)

#### Conflict with Present State Employees

A state officer or employee shall not engage in any employment, activity, or enterprise which is clearly inconsistent, incompatible, in conflict with, or inimical to his or her duties as a state officer or employee. (Government Code 19990)

### **L) REQUIRED ATTACHMENTS**

A complete proposal or proposal package will include the following items as attachments. Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.



**ATTACHMENT 1**  
**REQUIRED ATTACHMENT CHECK LIST**

A complete proposal or proposal package will consist of the items identified below. Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.

<b><u>Attachment</u></b>	<b><u>Attachment Name/Description</u></b>
<input type="checkbox"/> Attachment 1	Required Attachment Check List
<input type="checkbox"/> Attachment 2	Proposal/Proposer Certification Sheet
<input type="checkbox"/> Attachment 3	Cost Sheet
<input type="checkbox"/> Attachment 4	Proposer References
<input type="checkbox"/> Attachment 5	Payee Data Record (STD 204) The Payee Data Record can be found on the internet at: <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a> .
<input type="checkbox"/> Attachment 6	Contractor Certification Clauses (CCC). The CCC can be found on the Internet at <a href="http://www.ols.dgs.ca.gov/Standard+Languag">www.ols.dgs.ca.gov/Standard+Languag</a>

**ATTACHMENT 2**  
**ROPOSAL/PROPOSER CERTIFICATION SHEET**

This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package in duplicate with original signatures. The proposal must be transmitted in a sealed envelope in accordance with RFP instructions.

**Do not return Section C, Proposal Requirements and Information (pages 3 through 11) of this RFP.**

**For RFP Primary Only:**

- A. Our all-inclusive cost proposal is submitted in a sealed envelope marked "**Cost Proposal - Do Not Open**".
- B. Place all required attachments behind this certification sheet.
- C. The signature affixed hereon and dated certifies compliance with all the requirements of this proposal document. The signature below authorizes the verification of this certification.

**An Unsigned Proposal/Proposer Certification Sheet May Be Cause For Rejection**  
**ATTACHMENT 2 (Cont.)**

1. Company Name	2. Telephone Number (    )	2a. Fax Number (    )
3. Address		
Indicate your organization type:		
4. <input type="checkbox"/> Sole Proprietorship	5. <input type="checkbox"/> Partnership	6. <input type="checkbox"/> Corporation
Indicate the applicable employee and/or corporation number:		
7. Federal Employee ID No. (FEIN)	8. California Corporation No.	
9. Indicate applicable license and/or certification information:		
10. Proposer's Name (Print)		11. Title
12. <b>Signature</b>		13. Date
<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:</p> <p>a. California Small Business Enterprise</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, enter certification number: _____</p> </div> <div style="width: 48%;"> <p>b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, enter your service code below: _____</p> </div> </div> <p><b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is _____</p> <p>Date application was submitted to OSBCR, if an application is _____</p>		

**Completion Instructions for Proposal/Proposer Certification Sheet**  
 Complete the numbered items on the  
 Proposal/Proposer Certification Sheet by following the instructions below.

Item Numbers	Instructions
1, 2, 2a, 3	Must be completed. These items are self-explanatory.
4	Check if your firm is a sole proprietorship. A sole proprietorship is a form of business in which one person owns all the assets of the business in contrast to a partnership and corporation. The sole proprietor is solely liable for all the debts of the business.
5	Check if your firm is a partnership. A partnership is a voluntary agreement between two or more competent persons to place their money, effects, labor, and skill, or some or all of them in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them. An association of two or more persons to carry on, as co-owners, a business for profit.
6	Check if your firm is a corporation. A corporation is an artificial person or legal entity created by or under the authority of the laws of a state or nation, composed, in some rare instances, of a single person and his successors, being the incumbents of a particular office, but ordinarily consisting of an association of numerous individuals.
7	Enter your federal employee tax identification number.
8	Enter your corporation number assigned by the California Secretary of State's Office. This information is used for checking if a corporation is in good standing and qualified to conduct business in California.
9	Complete, if applicable, by indicating the type of license and/or certification that your firm possesses and that is required for the type of services being procured.
10,11 12, 13	Must be completed. These items are self-explanatory.
14	If certified as a California Small Business, place a check in the "yes" box, and enter your certification number on the line. If certified as a Disabled Veterans Business Enterprise, place a check in the "Yes" box and enter your service code on the line. If you are not certified to one or both, place a check in the "No" box. If your certification is pending, enter the date your application was submitted to OSBCR.

**ATTACHMENT 3**  
**SAMPLE COST PROPOSAL WORKSHEET**

SAMPLE BUDGET FOR March 2012– October 2014

Line Item	2011- 2012	2012- 2013	2013- 2014	Total
<b>A. Personnel Services</b>				
Salaries hours x hourly rate				
(list all staff)				
Temporary Help				
Staff Benefits				
<b>Total Personnel Services</b>				
<b>B. Consultants/Subcontractors</b>				
(Costs Itemized)				
<b>Total Subcontractors</b>				
<b>C. Travel Costs</b>				
Travel related to contract				
<b>Total Travel Costs</b>				
<b>D. Operating Costs</b>				
(Not included in Administrative Overhead E.)				
(Itemize per line item)				
<b>Total Operating Costs</b>				
<b>E. Administrative Overhead</b>				
<b>TOTAL CONTRACT</b>				

## **ATTACHMENT 4**

### **PROPOSER REFERENCES**

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal will cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

---

#### **REFERENCE 1**

---

Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

---

---

#### **REFERENCE 2**

---

Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

---

---

#### **REFERENCE 3**

---

Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

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April 29, 2013

State Council on Developmental Disabilities  
1507 21st Street, Suite 210  
Sacramento, CA 95811  
Attention: Kristie Allensworth

To whom it may concern:

It is with great pleasure that CAPC submits this proposal in response to the Self-Advocacy Support Grant. We have a long history of partnering with and supporting self-advocates to great success. We offer a well rounded and experienced team with a proven history of translating materials into plain language, developing advocacy and educational presentations, with and for self-advocates, using and instructing novice users in technology and social media for communication purposes, and thorough knowledge of Open Meeting and related laws. that will meet the Council's State Plan self-advocacy goal and objective quite week.

We have carefully read and understand all the provisions in this RFP and agree to be bound by them. We fully read and reviewed the terms and conditions as stated in the State Contracting Requirements, attached to the RFP, and, that by submitting a response understands that this document represents the agreement that we will be expected to execute if we are successfully awarded a Cycle 35 CPDG from the SCDD.

Please do not hesitate to contact me if you have any questions.

Sincerely,

  
Carolyn Ann Reggio  
Executive Director

# Self Advocacy Support Grant



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## Statement of Purpose/Overall Approach

CAPC proposes a variety of leadership development supports through a self-advocate and staff team that includes technology and other expert services to assist three state-wide California self-advocacy groups in accomplishing its leadership goals. As well, technical assistance will be provided to the supporting service system entities. The three self-advocacy groups are the Statewide Self-Advocacy Network (SSAN), the Self-Advocate Advisory Committee (SAAC), and the Employment First Committee (EFC).

CAPC, Inc. is a non-profit organization dedicated to serving adults with developmental disabilities, ages 18 and over, in greater Los Angeles and Orange County. CAPC provides supports by the philosophy that all people with disabilities are individuals with the ability to lead self-directed, productive, fulfilling lives while becoming contributing and respected members of their home communities. CAPC's innovative and individualized Supported Employment and Supported Living services support over 180 adults per year. Through individualized instruction, academic support, facilitated communication and life skills training, individuals with disabilities are continuing their post high school education, finishing vocational careers, going on to two and four year colleges, finding internships in their field of interest, moving out to their first apartment and becoming employed in their communities.

The CAPC team will provide leadership coaching and training, support in using technological applications for leadership communications, and training materials in plain language and a variety of formats with needed language translation. The CAPC team will be led by Project Director Sherry Beamer. The supports to be provided include

leadership coaching, strategic and project planning, meeting location research and coordination, and training development and material development in plain language.

CAPC will contract with a disability service system evaluation specialist to conduct a yearly evaluation. The evaluation will assess strategy effectiveness in core leadership areas for accessibility, application and replication. As a regular practice with the self-advocacy group leaders the CAPC team will assist in providing survey tools for ongoing assessment of leadership skill development, training quality, and comprehension of presentations and usability of adapted materials. This will include quality assessments of the facilitation and support agency.

All activities will be conducted by the following underlying tenets of the United Nations Convention on the Rights of People with Disabilities:

- Recognizing the valued existing and potential contributions made by persons with disabilities to the overall well-being and diversity of their communities which will result in their enhanced sense of belonging and in significant advances in the human, social and economic development of society and the eradication of poverty.
- Considering that persons with disabilities should have the opportunity to be actively involved in decision-making processes about policies and programs, including those directly concerning them.

As well, Americans with Disabilities Act standards for accessible meetings, online content and effective communication will be followed, along with the best practice principles for plain language, Train the Trainer content development, strategic planning and leadership coaching.

## Proposal Narrative

### Work Plan Grid

Grant Requirement	O	N	D	J	F	M	A	M	J	J	A	S
<u>Leadership Coaching</u>												
SSAN: Assisting, consulting Chair, Vice Chair developing agenda, mtg plans, follow-up (4x/yr)	X	X	X	X	X	X	X	X	X	X	X	X
SSAN: Assist in developing annual plan, implementation (4x/yr)	X	X	X	X	X	X	X	X	X	X	X	X
SAAC: Assisting, consulting w/Chair in developing agenda, Council report, meeting plans, required follow-up (6x/yr)	X	X	X	X	X	X	X	X	X	X	X	X
<u>Meeting Logistics</u>												
SSAN:												
Mtg location research, event planning, reasonable accommodation (4x/yr)	X	X	X	X	X			X			X	
Written and alternative materials (4x/yr)	X	X		X	X		X	X		X	X	
SAAC:												
Written/alternative materials as needed/requested by Chair	X	X	X	X	X	X	X	X	X	X	X	X
EFC:												
Written/alternative materials as needed/requested by Chair	X	X		X	X		X	X		X	X	
Support and guidance for time limited self-advocacy project			X			X			X			X
<u>Training/Train the Trainer</u>												
Develop SSAN 4 training presentations, selected with membership, incl speakers variety of formats	X	X	X	X	X	X	X	X	X	X	X	X
<u>Video Products:</u>												
Upon request, 2 presentations will be condensed and produced into 15 minute videos with plain language posted on website						X	X			X	X	X
<u>Plain Language Materials</u>												
SSAN:												
All materials developed	X	X	X	X	X	X	X	X	X	X	X	X
Develop brochure	X	X	X									
Print brochure for wide distribution				X								
SAAC:												
Council packet, materials directed by Chair	X	X	X	X	X	X	X	X	X	X	X	X
EFC:												
Packet and materials, Self-Advocacy Specialist		X			X			X			X	
<u>Technology mentoring</u>	X	X	X	X	X	X	X	X	X	X	X	X
<u>Technical Support to Area Boards and Regions</u>	X	X	X	X	X	X	X	X	X	X	X	X
<u>Evaluation: data collection, QA checks, reports</u>		X	X	X	X	X	X	X	X	X	X	X

## Measurable Goals, Objectives, Implementation Strategies, Outcomes:

*Leadership Coaching:* for the leaders of the three groups in developing meeting agendas, report making, plans and follow-up activities; in strategic planning in order to develop and implement an annual plan for the SSAN, potential self-advocacy project for EFC.

Sherry Beamer will take lead responsibility for leadership coaching. As desired the self advocacy group leaders will work with Sherry to complete an assessment that reviews best practices such as excellent meetings, management, planning, leadership and member relations. Leadership coaching will assure safe and challenging arrangements with a focus on self-awareness, learning from experience and role modeling. This will include strategic and project planning using assessment, strategy and evaluation sections. As scheduled in the Work Plan grid, after a schedule is developed with the SSAN and SSAC coaching is anticipated in preparation of each meeting including follow-up from the prior meeting, and as needed based on the assessment in-between meetings.

*Meeting Logistics:* Meeting location research including reasonable accommodation checks and event planning for SSAN meetings on behalf of the State Council and coordination with the Facilitation and Attendant Services contractor.

Americans with Disabilities Act (ADA) guidelines will be utilized to assist in selecting meeting locations. This includes maneuverability in meeting rooms and restrooms, parking, restaurants that can accommodate special diets, local public accessible transportation, lighting, room setup, entrance and doors, and audible and visual fire and emergency systems. As well, if there are staff involved with the locations

they will be checked for great customer service and/or will be trained in accommodations.

*Training Development:* production and implementation support for a four module Train the Trainer series with the SSAN available in a variety of formats, including two 15 minute video courses to be posted on the State Council website if requested.

The SSAN training, after topics are selected by the members, will be developed with learning by doing principles. In order to support a Train the Trainers component solid lesson plans and visual materials with learning activities will be developed. Basic information will be provided for the trainers about learning styles and how to be a confident teacher.

*Video Products:* if it is decided that video products of two of the training sessions will be produced, filming of the sessions will be converted into an online course. Technical support will be provided to place the course on the State Council's website. The course will be developed by universal design principles. The principles include:

- Developing content first, then course design.
- Provide simple, consistent navigation.
- Include an accommodation statement.
- Choose Content Management System tools carefully.
- Use color with care.
- Provide accessible document formats.
- Choose fonts carefully.

*Plain Language Material Development:* for the SSAN brochure and leadership/meeting materials, the State Council meeting packets including the SAAC materials, and any needed EFC meeting packet and other materials.

Training and communication materials will be developed by plain language principals with communication that the audience can understand the first time they read or hear. Writing techniques that will be used include logical organization with the reader in mind, first person, active voice, short sentences, common everyday words, increased font size, and easy design features. These include pictorial representations with photos, public domain resources like the California Department of Developmental Services' *Ways to Make Complex Information Simple*. As there is not a lot of good stock photography available of people with disabilities, commissioning of appropriate images is needed.

### Evaluation Plan

Evaluation data will be collected by members of each group meeting and activity and forwarded to the evaluation specialist. Quarterly quality assurance contact will be made to the group leaders. The data will be tabulated, interpreted and reported quarterly. A year-end report will be completed that will cover the following with the groups:

- What do you think the grant has accomplished?
- How did the grant meet/not meet your expectations?
- What was most helpful/least helpful with the grant?
- What would you do differently with the grant?
- What additional supports or services do you think were needed in the implementation of the grant?

## Project Team Qualifications

CAPC has been supporting a large number of self-advocacy groups since the Southern California development through North Los Angeles County Regional Center in the early 1990s. Today all 180 people CAPC supports can join or start a self-advocacy group. Currently CAPC has 10 groups in operation. CAPC's Executive Director, Carolyn Ann Reggio, has been with the organization for 29 years. Since starting as a Companion Care Instructor she has held several positions which have included overseeing CAPC's self advocacy program and currently includes facilitating a self advocacy group. Her vast knowledge of the self advocacy movement and strong community relations will be utilized in performance of this grant. Edith Fierro, Renee Gonzales and Joseph Mainez lead CAPC's over 160 staff members in the area of self-advocacy opportunities and growth. With more than 20 years experience at CAPC, Edith provides training and guidance to facilitators and self-advocates. She serves as a conduit between CAPC's individuals served, direct service staff and CAPC's administration and Board of Directors to monitor and improve on CAPC's self advocacy program. In addition, she currently facilitates one of CAPC's self advocacy groups. Renee's passion to empower those she supports drives from her involvement with working with the Area Boards and serving as a trainer to new staff and individuals served by CAPC. Joseph's background in supporting individuals with communication and behavioral barriers has proven to be an asset in providing company-wide workshops and trainings specifically in the area of self-advocacy. Jim Ditter, CAPC Individual Served and Board Member has been a statewide leader in the self advocacy movement. He has grown attendance at the San Diego People First conference from



one individual served by CAPC nine years ago to 58 individuals expected to attend the upcoming conference. Jim is a mentor to other self advocates and encourages all individuals to learn to advocate for themselves and become part of the self advocacy community.

Sherry Beamer will have lead responsibility as the Project Director for the Self Advocacy Support Grant. Sherry has been involved in the self-advocacy movement since 1990 when she led the self-advocacy project at North Los Angeles County Regional Center that established a network of self-advocacy groups that remain in existence today. This led to a long-term relationship with the Self-Advocacy Board of Los Angeles County; Sherry served as the conference coordinator for several years assisting in selecting the hotels for the best adapted accommodations possible. Sherry has assisted a variety of organizations in strategic planning and other leadership activities her entire professional career of over 16 years experience including self-advocacy organizations. Planning has included California system change for customized employment and micro-enterprise development. She co-created the Board Resource Center and has over ten years experience adapted materials into plain language and leadership training designed for people with disabilities. Sherry was the project lead for the *Consumer Guide to the Lanterman Act*. As well she was lead for the *Robert's Choice; Beginning Steps to Self Advocacy* video training project. Sherry also has online learning development, technology mentoring and marketing communication experience after three years working for the web-based Essential Learning. A recent set of courses were built with video inserts with the Center for Self-Determination for Medicaid Waiver required training for the program.

## Project Role Responsibilities

### *Project Director:*

- Lead responsibility for achieving grant outcomes
- Lead leadership coach, project planner
- Contracting with and managing work of vendors/contractors
- Report development
- Oversee and manage grant experts, vendors and project evaluator
- Oversee Director of Services

### *Director of Services:*

- Assist the Project Director in working with self advocacy groups
- Oversee the Case Managers duties
- Coordinate inclusion of CAPC self advocacy experts in the grant process
- Provide input in all areas of instructional material and brochures

### *Case Manager:*

- Assist Project Director and Director of Services working with self advocacy groups
- Manage, coordinate and assist CAPC self advocacy experts in the grant process

### *Self Advocacy Experts*

- Provide Project Director, Director of Services and Case Manager input on the needs of self advocates
- Assist in providing input on video production, technology needs and brochures, teaching materials to be provided to the self advocacy groups

## Project Leaders Job Descriptions

### *Executive Director-*

- Provide necessary information for the Board of Directors to responsibly fulfill oversight responsibilities of CAPC
- Coordinate the development and implementation of CAPC's strategic plan
- Develop, implement, and administer policies and procedures to govern the administration of CAPC
- Oversee grant requests & implementation
- Promote CAPC marketing, supported employment, and fundraising goals and objectives by meeting with and presenting to relevant community members and organizations (e.g., Chambers of Commerce, service clubs, social organizations, etc.)

- Maintain necessary communications with staff, individuals, families, funding sources, community organizations and members to market CAPC services and promote self advocacy

#### Project Director-

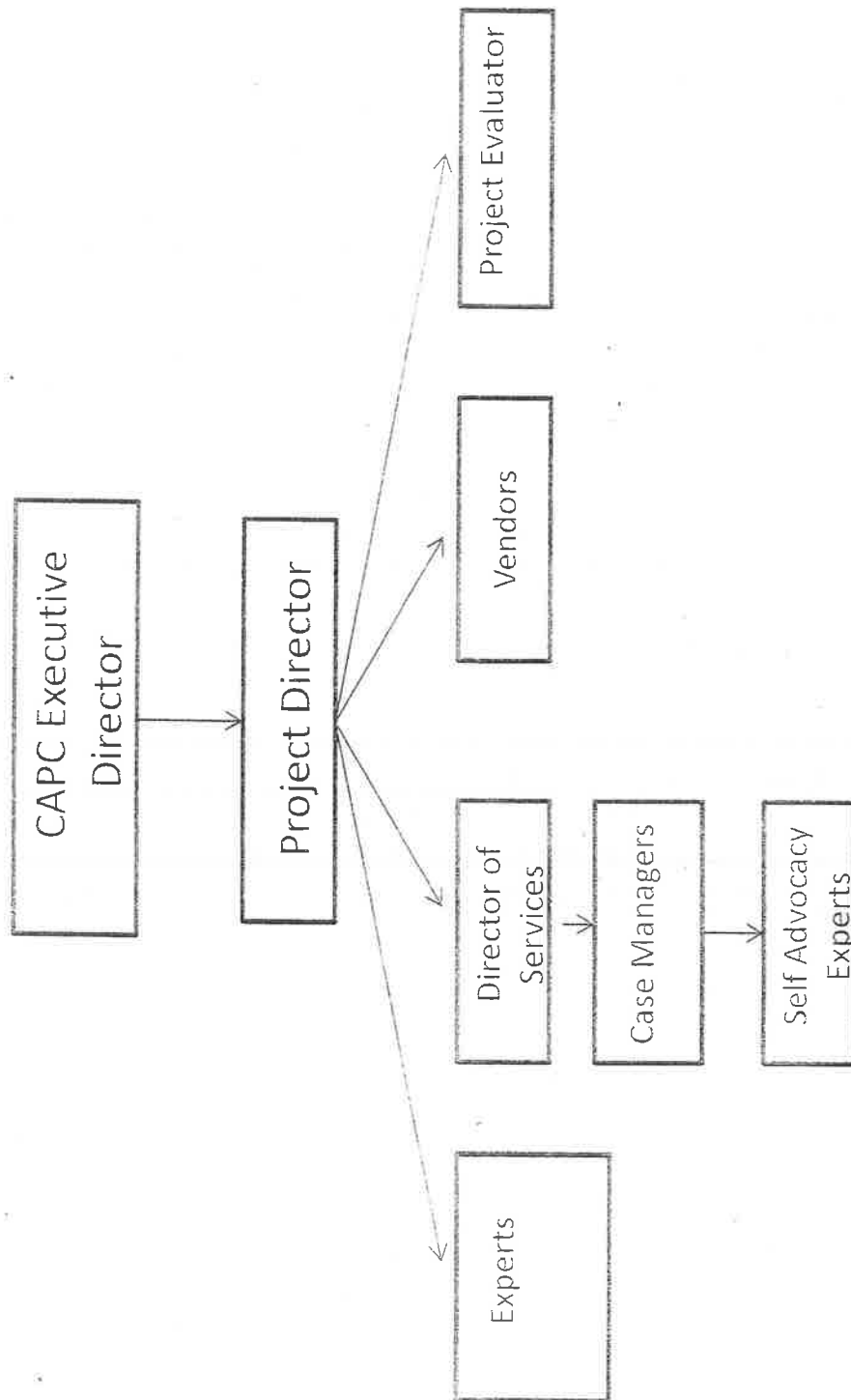
- Develop and administer appropriate grants and maintain all reporting requirements as outlined in the grant.
- Oversee individual/family trainings and self advocacy groups
- Provide support and guidance to staff on individual services and issues, including adaptations and instructional strategies for individuals, which lead to further independence.
- Maintain necessary communications with staff, individuals, families, self advocacy groups, funding sources, community organizations and members to market CAPC services.

#### Director of Services-

- Manage and support all CAPC self advocacy groups and services
- Provide support and guidance to Case Managers on individual services and issues, including adaptations and instructional strategies for individuals which lead to further independence
- Maintain up-to-date knowledge of best practices in the area of supported living services, supported employment and self advocacy

#### Case Managers-

- Coordinate all individual services to facilitate individuals' attainment of goals and objectives utilizing best practices and the self advocacy approach
- Monitor individuals' progress towards an improved quality of life
- Maintain regular communication with individuals' families and circles of support, when appropriate



<u>Previous Grants/Awards</u>	<u>Date</u>	<u>Name of Project</u>	<u>Contact Person</u>	<u>Phone No.</u>	<u>Amount</u>
City of Pico Rivera	2011-2012	Self Advocacy Groups	Patsy Gonzales	562-801-4347	\$ 2,000
City of Whittier	2011-2012	Prepare for Success	Fran Shields	562-567-9400	\$ 1,200
Rotary Club of Whittier	5/16/2012	Spring Spruce Up Kits	Kenton Woods	562-692-1212	\$ 1,100
Special Childrens League	6/4/2012	Wish List	Debbie Bratton	626-437-3412	\$ 2,000
Boeing Employees Community Fund	12/16/2011	Support Project Developer	Carrie L. Bollwinkle	562-593-2612	\$ 5,000
Whittier Host Lions Club	12/30/2011	Be Prepared Project	Glenn Watje	562-945-9638	\$ 2,360
City of La Mirada	2011-2012	General Funds	Lisa Montoya	562-902-3175	\$ 400
Los Angeles County Supervisor Don Knabe	2011-2012	Fundraising	Andrea Avila	562-807-7350	\$ 8,000
Southern California Edison	7/18/2012	Instruct For Success Staff Development Project	Sylvia Sutherland	562-716-8202	\$ 5,000
City of Pico Rivera	2012-2013	Conference & Classes for Individuals Served	Patsy Gonzales	562-801-4332	\$ 2,000
City of Whittier	2012-2013	Autism & the Need for a New Prospective Program	Fran Shields	562-567-9400	\$ 1,200
Los Angeles County Supervisor Don Knabe	2012-2013	Fundraising	Andrea Avila	562-807-7350	\$ 10,000

**ATTACHMENT 3****BUDGET**

<b>Line Item</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>Total</b>
<b>A. Personnel Services</b>			
Project Director 490 hrs @\$62.50/hour	\$ 22,969	\$ 7,656	\$ 30,625
Director of Services 60 hrs @ \$31.93/hour	\$ 1,437	\$ 479	\$ 1,916
Case Manager 204 hrs @ \$19.83/hour	\$ 3,034	\$ 1,011	\$ 4,045
Case Manager 204 hrs @ \$17.00/hour	\$ 2,601	\$ 867	\$ 3,468
Staff Benefits- Medical Insurance	\$ 2,594	\$ 864	\$ 3,458
Payroll Taxes & W/C Insurance	\$ 2,599	\$ 866	\$ 3,465
<b>Total Personnel Services</b>	<b>\$ 35,234</b>	<b>\$ 11,743</b>	<b>\$ 46,977</b>
<b>B. Consultants/Subcontractors</b>			
Self Advocacy Consultants	\$ 525	\$ 175	\$ 700
Video Production	\$ 20,000	\$ 25,000	\$ 45,000
Video Production- 15 minute videos to be posted on website	\$ 5,000	\$ 5,000	\$ 10,000
Brochure translator	\$ 4,000		\$ 4,000
Evaluation consultant	\$ 2,250	\$ 750	\$ 3,000
<b>Total Subcontractors</b>	<b>\$ 31,775</b>	<b>\$ 30,925</b>	<b>\$ 62,700</b>

**C. Travel Costs**

Travel to SSAN, SAAC and EFC meetings	\$ 10,500	\$ 3,500	\$ 14,000
<b>Total Travel Costs</b>	<b>\$ 10,500</b>	<b>\$ 3,500</b>	<b>\$ 14,000</b>

**D. Operating Costs**

Commissioned photos for brochures	\$ 3,500		\$ 3,500
Printing of multi-language brochures	\$ 10,000		\$ 10,000
Copy paper, supplies, In-Kind Contributions	\$ 3,375	\$ 1,125	\$ 4,500
Business community experts	n/c	n/c	n/c
Rent, phones and office support	n/c	n/c	n/c
<b>Total Operating Costs</b>	<b>\$ 16,875</b>	<b>\$ 1,125</b>	<b>\$ 18,000</b>

**E. Administrative Overhead**

<b>\$ 9,438</b>	<b>\$ 4,729</b>	<b>\$ 14,167</b>
-----------------	-----------------	------------------

**TOTAL CONTRACT**

<b>\$ 103,822</b>	<b>\$ 52,022</b>	<b>\$ 155,844</b>
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## **ATTACHMENT 3**

### **LINE ITEM BUDGET NARRATIVE**

#### **A. Personnel**

1. The project has budgeted for a Project Director at an average of 9.5 hours per week over a 12 month period. The Project Director will attend the SSAN, SAAC and EFC meetings and work with the chairs in developing and implementing annual plans, agenda, meeting plans and follow up. The Project Director will be the lead position in developing written/alternative materials, training presentations, video products, plain language materials and technological support. The Project Director will coordinate and oversee all experts and work directly with vendors on the project.
2. The Director of Services is budgeted at an average of 1.25 hours per week over a 12 month period. The Director of Services will assist the Project Director in her duties working directly with the self advocacy groups, experts and vendors.
3. Case Managers (2) are budgeted at an average of 4 hours per week each over a 12 month period. The Case Managers will work with the self advocacy groups, assist the Project Director and Director of Services as needed and work directly with CAPC individuals served who will act as consultants in providing self advocacy expertise.
4. Staff Benefits – CAPC pays a portion of medical and dental coverage for its full-time employees. This amount represents medical and dental costs allocated by the ratio of total hours to be worked on the grant to total work hours in a calendar year.
5. Payroll Taxes and Workmen's Compensation Insurance – This amount reflects the government mandated employer cost of social security tax, medicare insurance, unemployment insurance and workmen's compensation insurance.

#### **B. Consultant/Subcontractors**

1. Self Advocacy Consultants – Individuals who are provided services by CAPC will be consulted for their expertise in the field of self advocacy services. The amount represents a total of 70 hours over the twelve month period.
2. Video Production - CAPC will subcontract a videographer ( Michelle Le Anne Reeder) who is proficient in instructional design, course development, project management and online course facilitation. Video Products will include the creation, use, delivery and instruction to self advocacy groups for use in promoting and teaching accessible and cost effective communication for self-advocates.



3. Video Presentation – Upon request, CAPC’s contractor will condense two presentations into 15 minute videos with plain language to be posted on the State Council of Developmental Disabilities’ website.
4. Brochure Translator – Brochure will be translated by ISI Translation Services, a professional translation service into Spanish and Chinese. The cost for translation is computed at the rates of Spanish \$.165 new words/\$.0825 leverage words and for Chinese \$.19 new words/\$.095 leveraged words.
5. Evaluation Consultant – CAPC will hire a subcontractor, Vickie Vining at \$75 per hour to conduct on-going evaluations at 8 hours per quarter and final program evaluation at 8 hours.

#### **C. Travel Costs**

Travel costs include airfare and lodging for four trips for Project Director to meet with, assist and consult SSAN Chair and Vice Chair to develop agendas, meeting plans and follow-up support. Project Director will also travel 4 times to assist the SSAN Consulting Chair and Vice Chair to develop and implement annual plans. The Project Director will travel to meet with SAAC Chair assist and consult Chair to develop agenda, Council Report, meeting plans and follow-up support.

#### **D. Operating Costs**

1. Commissioned Photos for Brochures - There are currently few quality stock images of individuals with developmental disabilities available. Consequently in order to provide a high quality, professional brochure CAPC will be hiring a professional photographer at the rate of \$250 per hour.
2. Printing of Multi-Language Brochure for Vast Distribution – CAPC will be printing the self advocacy brochure for distribution in English, Spanish, Chinese and any other formats requested by SSAN, SAAC and EFC. Requested quantities will be printed for distribution to self advocates statewide.
3. Copy paper, supplies etc – CAPC will need office supplies for use in the performance of this grant project. Supplies will include but are not limited to copy paper, general office supplies, flip still and video cameras and other materials necessary to capture and document self advocacy as well as provide professional, usable materials for the self advocacy groups.
4. In-Kind Costs - CAPC will utilize its expert business supports in the community to assist with accounting, legal and marketing costs of the grant. CAPC will utilize its existing equipment, office space, phone services (land lines and cell phones), and office support staff without allocating these costs to the grant expense.

#### **E. Administrative Overhead**

Administrative Overhead is charged at the rate of 10%, CAPC’s current overhead rate as determined by outside accountants.



State Council on Developmental Disabilities  
1507 21st Street, Suite 210  
Sacramento, CA 95811  
Attention: Kristie Allensworth

April 29, 2013

Re: CAPC State Council Self-Advocacy Support Grant Proposal

To whom it may concern:

PIH Health has partnered with CAPC for over 15 years providing opportunities and a safe, welcoming environment for people with disabilities. Through our Volunteer Department we have welcomed an estimated 75 individuals and their advocates. These individuals volunteer alongside our staff, providing our staff and organization support, while receiving training in a professional environment, a sense of belonging and purpose. Our CAPC Volunteers are encouraged to learn new tasks and continue to grow during their time with us.

We are pleased to support the proposal submitted by CAPC, Inc. for the Self-Advocacy Support Grant to support and advance the self-advocacy activities of the State Council on Developmental Disabilities through leadership coaching, training and other self-advocacy support services. We know the importance of assuring that people with disabilities join at the decision making table for designing delivery of services and supports.

CAPC is a valued local organization that consistently and successfully works with people with disabilities to develop quality, productive lives designed to individual needs and preferences. This has included providing excellent and stable self-advocacy leadership training and supports for over twenty years.

We are very proud of our relationship with CAPC; we see firsthand every day the value CAPC brings to people with disabilities. We strongly support CAPC in pursuing this grant.

Sincerely,



Nancy Whyte  
Director Volunteer Services & Community Health Education  
PIH Health Hospital  
12401 Washington Blvd.  
Whittier, CA 90601



JAYNOLAN  
community services

April 22, 2013

State Council on Developmental Disabilities  
1507 21st Street, Suite 210  
Sacramento, CA 95811  
Attention: Kristie Allensworth

Re: CAPC State Council Self-Advocacy Support Grant Proposal

To whom it may concern:

On behalf of Jay Nolan Community Services, I am pleased to support the proposal submitted by CAPC (Capitalizing on Capabilities) for the Self-Advocacy Support Grant to support and advance the self-advocacy activities of the State Council on Developmental Disabilities through leadership coaching, training and other self advocacy support services. We support as well the submission in the proposal of Sherry Beamer as a key part of the project.

At Jay Nolan Community Services, we feel very strongly that people with disabilities should play strong and meaningful roles in the decision making for their own lives and in designing and implementing the service delivery system they rely on in California. We are confident in Ms. Beamer's expertise in and commitment to the strengthening and increasing of self-advocacy opportunities for people with disabilities.

We are very familiar with the work of CAPC as an organization and we know them to provide person centered and values based services to assist people with disabilities to improve their quality of life and increase their options for living valued lives in the community. We know CAPC has provided excellent and stable self-advocacy leadership training and supports for over twenty years. We strongly support CAPC in pursuing this grant.

Sincerely,

Jeffrey L. Strully  
Executive Director

[www.jaynolan.org](http://www.jaynolan.org)

15501 San Fernando Mission Blvd., Suite 200, PO Box 9604, Mission Hills, CA 91346-9604  
Phone: (818) 361-6400 | Fax: (818) 365-0522 | Email: [info@jaynolan.org](mailto:info@jaynolan.org)

April 24, 2013

State Council on Developmental Disabilities  
1507 21st Street, Suite 210  
Sacramento, CA 95811  
Attention: Kristie Allensworth

Re: CAPC State Council Self-Advocacy Support Grant Proposal

To whom it may concern:

We are pleased to support the proposal submitted by CAPC (Capitalizing on Capabilities) for the Self-Advocacy Support Grant to support and advance the self-advocacy activities of the State Council on Developmental Disabilities through leadership coaching, training and other self advocacy support services. We know the importance of assuring that people with disabilities participate in their communities as valued members.

The Whittier Area Chamber of Commerce has a long history with CAPC. They have been a member in good standing for years and have an outstanding reputation in our community. CAPC is a valued local organization that, for over 20 years, has consistently and successfully works with people with disabilities to develop quality, productive lives designed to meet individual needs and preferences. This has included providing excellent and stable self-advocacy leadership training.

As an employer of a person with a disability through CAPC's job coaching program, I can speak firsthand on the importance of having funds available to continue this kind of training. We strongly support CAPC in pursuing this grant.

Please do not hesitate to contact me for any further information.

Sincerely,



Carol Crosby  
Executive Director

## Carolyn Ann Reggio

1298 Woodcrest Avenue, Brea, Ca 92821  
Cell: (562) 631-1766 Work: (562) 693-8826  
email: [reggioc@capcinc.org](mailto:reggioc@capcinc.org)

### EMPLOYMENT HISTORY

Jan 2007-Present

Executive Director, CAPC Inc., Whittier, CA

Administer nonprofit corporation providing community-based, consumer driven supported employment, supported living, and community inclusion services for adults with disabilities. Serve as a liaison to community services and agencies.

Feb 2006 – Dec 2006

Interim Executive Director, CAPC, Inc., Whittier, CA

Administer nonprofit corporation providing community-based, consumer driven supported employment, supported living, and community inclusion services for adults with disabilities. Serve as a liaison to community services and agencies.

July 2005 – Jan 2006

Assistant Executive Director / Director of Development, CAPC Inc., Whittier, CA

Under the general supervision of the Executive Director, oversee, coordinate, and supervise key organizational functions, marketing of CAPC, fund development, coordinate special fundraising events, and coordinates grant applications and implementation of grant programs.

March 1990-June 2005

Development Director / Associate Director, CAPC Inc., Whittier, CA

Under the general direction of the Executive Director, provides fund development, coordinates special fundraising events, coordinates grant applications and implementation of grant programs, and coordinates supported employment development and services. Assisted leaders and facilitated self-advocacy groups to promote self-awareness, problem solving and understanding Rights and Responsibilities and advocating for self, and others.

1995-1996

Technical Advisor Self-Advocacy Project – Children's Hospital, Los Angeles

- Assisted Project Coordinator in implementing federal grant that created a video training program by and for people with disabilities to speak for themselves.

March 1987-Feb 1990

Job Developer, CAPC, Inc., Whittier, CA

Under the general direction of the Associate Director, Resource Development and Personnel, provided job development and placement for job ready consumers on a part-time basis. Contacted employers in the private and public sector to develop situational assessment sites, volunteer sites, and employment for individuals and groups of persons with disabilities.

March 1987-Feb 1990

Program Specialist, CAPC, Inc., Whittier, CA

Under the general direction of the Associate Director of Staff Development, provided hands on instruction and support to the staff of Community Advocates working with individuals with disabilities on a part time basis.

Dec 1985- June 1991

Companion Care Instructor, ROP

Developed and implemented community based program preparing individuals who are developmentally disabled to be companions for elderly persons. As such coordinated cooperative efforts of various community resources including Posada Retirement Living, Project Info, Intercommunity Blind Center, and others.

**EDUCATION**

B.A., Child Development – California State University, LA  
A.A., Early Childhood Education – East Los Angeles J.C.

**COMMUNITY AND PROFESSIONAL INVOLVEMENT**

2012- Present

Santa Fe Springs Chamber Executive Board Member

2012- Present

Whittier Chamber of Commerce Board Member

April 2006- April 2007

Whittier Chamber of Commerce Board President

April 2006-Present

Rio Hondo College Disabled Students Advisory Committee

Sept 2003-Present

High School Mentor Program

1999-2008

Whittier Chamber of Commerce Board Member

1999-Present

Santa Fe Springs Chamber Ambassador

1999-Present

Soroptimist International of Whittier

1999-Present

Santa Fe Springs Destiny Scholarship Committee

1997-2006

Director of CAPC's Self Advocacy Groups

## **SHERRY BEAMER**

727 N. Lincoln Street Burbank, CA 91506  
(818) 521-5698 [beamer.sherry@gmail.com](mailto:beamer.sherry@gmail.com)

### **PROFESSIONAL EXPERIENCE:**

**Essential Learning/Relias Learning VICE-PRESIDENT/PRODUCT MANAGER, Intellectual and Developmental Disabilities Services** San Diego, CA and Cary, NC  
7/10-present

Virtual national online learning company for human service organizations providing supports in behavioral health, addiction treatment, disabilities and child welfare. Hold inaugural product line leadership position for Developmental Disabilities market in United States. Conduct ongoing market analysis to build scalable services and yearly course development plan and budget. Work with content partners and course development staff to develop interactive online asynchronous courses. Contracting and business development with international/national content partners such as CQL, AAIDD, NADD, ANCOR. Promotional business development with States, Associations and agencies including regulatory research and relationship building with leaders. Development and support to national Advisory Board of diverse stakeholders and thought leaders. Technical support to customers and implementation. Realized 2012 team goal of \$900,000 including a \$1.5M 5-year contract with the State of Tennessee.

**Sherry Beamer & Associates, Inc. PRESIDENT** Burbank, CA 1/94 – 7/10

Virtual management consulting business for human services to build capacity for excellent services through project management, organizational and operational planning, leadership development and best practice consultation and training, with a specialty in change management. Built the company from a part-time sole proprietorship to a flexible corporation with employees and contractors. Typical customer was agency Executive Director or organization leader. Company served over 50 clients. Contract highlights:

- Development and implementation of values based quality frameworks for performance contracts, audits, pilot initiatives, accreditation and certification for regional systems and individual service providers; Project Manager on variety of satisfaction, self determination and deinstitutionalization studies with Center for Outcome Analysis, Xenologix; contributor to study reports and research papers
- Development and implementation of strategic planning processes for a variety of organizational and project needs, such as deinstitutionalization, inclusive boards, self-advocacy development, customized and self-employment capacity building, inclusive services development, staff and community training plans
- Multiple local, national and international presentations at conferences and events with a variety of stakeholders to broad and varied audiences on best practices in organizational and leadership development, quality assurance, capacity building for employment supports, inclusive boards, self-advocacy development, inclusive services

Sampling of customers: California Department of Developmental Services, Provincial Government of Alberta Canada, California State Council on Developmental Disabilities, UCLA Tarjan Center University Center for Excellence, California Regional Centers, Los Angeles Child Care Planning Committee, City of Santa Monica, People First of California, United Way of Greater Los Angeles, variety of service providers, variety of Associations: self-advocacy, family, service provision, disability specific

**Spectrum Home Services PRESIDENT and OWNER** (part-time) Burbank, CA 1/08 – 7/10

Home care services franchise investment business servicing retirees, homeowners and foreclosure industry with handyman, housecleaning, yard care and personal care services. Held Contractor's license. Responsible for all aspects of building the company. Employed 10 staff with 300% growth first year. Closed due to economic downturn; maintain ownership of franchise.

**Kids Included Together, Los Angeles, Inc. ASSISTANT DIRECTOR** Southern California 7/05 – 7/10  
Promoted from contracted consulting Coordinator. Expanded successful nonprofit for inclusive youth programming for children with disabilities from San Diego to Los Angeles, including chapter incorporation and tax exempt determination, board and staff development, fundraising and community partnership development, and program services provision. In three years trained 600 staff affecting 5000 children including 500 children with disabilities with yearly budgets under \$100,000.

**Board Resource Center VICE-PRESIDENT** Toluca Lake, CA 1996 - 2005

Co-built virtual consulting business providing customized strategies to ensure effective and inclusive boards and committees. Provided multiple board, Committee facilitations/workshops nationally and in Canada. Known for designing multi-media adapted training materials to successfully teach complex skills to people with developmental disabilities and general public.

**USC University Affiliated Program, Children's Hospital PROJECT COORDINATOR** (part-time)

Los Angeles, CA 4/94 – 7/96

Responsible for 3-year federal grant that created a video training program by and for people with disabilities to speak for themselves: five hundred people with disabilities trained statewide.

**Easter Seals Society AREA DIRECTOR** Los Angeles, CA 1/93 - 12/93

Responsible for 100 direct service employees and \$1 million of employment and independent living services for adults with developmental disabilities. Supervised 4 program management staff, created and managed budgets for ten program cost centers, managed property, built and maintained relationships with funders and partners, conducted analysis for new service development. Reported to Vice-President and participated in management team with 5 other Area Directors in Los Angeles and Orange Counties.

**North Los Angeles County Regional Center COUNSELOR, SUPERVISING COUNSELOR, QUALITY ASSURANCE SPECIALIST AND INTERIM MANAGER** Van Nuys, CA 4/87 – 12/92

Started with agency as Counselor providing case management services to 75 students and adults with disabilities. Promoted to Supervising Counselor, directing 10 Counselors with unit caseload of 1000; provided on call support to 3000 clients weekly. Reported to the Associate Director of Case Management Services and participated in management team with 10 other Supervising Counselors. Served as Quality Assurance Specialist and Interim Manager of Quality Assurance Department. As Quality Assurance Specialist increased employment for clients by 30% in two years by assisting day program providers to offer supported employment services and facilitated development of initial regional self-advocacy network.

**Center for Disabled Student Services, Chicago City-Wide College**

**JOB COACH, TRAINING SPECIALIST** 12/83- 3/87

Managed janitorial job training program; relocated from University of Illinois Chicago to Illinois Institute of Technology for increased job skill development; all clients were placed in jobs paying well over minimum wage. Launched Supported Employment program as part of the federal initiative.

**George Halas Jr. Vocational Center REHABILITATION TRAINING COUNSELOR**

Chicago, IL 5/82 – 11/83

Worked with 100 adults with severe disabilities, providing job training and case management services for job placement outside of the workshop.



**Boy Scouts of America DISTRICT EXECUTIVE** Mansfield, OH 6/81 - 4/82

Recruited from college as part of the Boy Scout's national program to diversify its workforce with women. Responsible for all scouting programs and functions in assigned geographic area, including recruiting and mentoring new scouting groups and leaders, fund-raising and board development.

**EDUCATION:**

1995 Entrepreneurship Program Valley Economic Development Center, Van Nuys, California

March, 1987 MSW, Administration University of Illinois, Chicago,  
Jane Addams College of Social Work

May, 1981 BA, Sociology/Social Work Miami University Oxford, Ohio

**COMMUNITY and PROFESSIONAL INVOLVEMENT, Past and Present:**

Board Secretary/Treasurer – All Kids Inc. – 2010 – present

PTA President, First Vice-President - Burroughs High School (650 members), 2010-13, 2013 Honorary  
Service Award Recipient, State Spotlight Awards for Advocacy and Leadership; First Vice-  
President – Edison Elementary, 2002-05

Board member, Southern California-APSE Chapter, 2010-present

Board Member, Secretary - California Association of Micro-Enterprise Opportunity, 2007-12

Home Host, International Visitors Council of Los Angeles, 2005-10

# Michelle LeAnne Reeder

12716 Cumbres Road, Valley Center, CA 92082 · 760-519-0347 · [mreeder9725@gmail.com](mailto:mreeder9725@gmail.com)

## SUMMARY

Ten years experience in instructional design, course development, project management and online course facilitation. Graduate degree in online instructional design. Outstanding performance on initiatives requiring design and development expertise and excellent writing skills. Eight years of experience in higher education including online course instruction.

## CORE COMPETENCIES

Ability to take an e-learning course from concept to delivery through the entire development life cycle. Expertise with instructional design and rapid e-learning best practices. Microsoft Office Specialist Certified in PowerPoint. Experience with needs analysis, planning, directing, implementing and evaluating courses delivered by technologically based modalities. Extensive experience with instructional design software including Lectora and Articulate. Possess foundational knowledge and understanding of learning theory and instructional design techniques including the ADDIE design process, needs analysis, storyboarding, and evaluation.

## SOFTWARE SKILLS

- Articulate Studio '09
- Articulate Storyline
- Lectora Inspire/Empower
- SharePoint 2010
- Adobe Fireworks
- Audacity
- SnagIt
- Microsoft Office 2010

## ACCOMPLISHMENTS

- Partnered with stakeholders, developers, and subject matter experts to create high quality e-learning courses, presentations and demonstrations using multimedia and interactive development tools.
- Personally designed and developed over 300 web-based courses amounting to nearly 2,000 continuing education credits.
- Provided leadership in the development of over 1000 online continuing education courses that were instructionally sound, high quality, accurate, and conveyed learning concepts creatively.
- Established the educational technology department for Essential Learning including hiring developers, creating an asset library, implementing quality assurance policies and procedures, developing standardized development processes and ensuring annual department goals were met.
- Proven track record in developing e-learning courses for professional development in both asynchronous and synchronous web-based formats while being cost effective, flexible, and efficient.
- Leveraged technology and development experience to create innovative e-learning programs with established instructional design methodology and sound pedagogy.
- Presented at multiple conferences on topics such as rapid instructional design and adult learning.

# Michelle LeAnne Reeder

12716 Cumbres Road, Valley Center, CA 92082 · 760-519-0347 · [mreeder0725@gmail.com](mailto:mreeder0725@gmail.com)

## WORK HISTORY

### **Freelance Instructional Designer & Course Developer 2013**

*Mack and Volvo Trucks Inc. (ILC, Ltd.)*

Part of a team of developers responsible for revising online courses using a new Lectora template and updated branding for Volvo.

### **Director of Educational Technology 2005 – 2013**

#### **Senior Instructional Designer & Developer**

*Essential Learning/Relias Learning, San Diego, CA*

Applied instructional design processes such as conducting needs analyses, developing learning outcomes, specifying instructional strategies, designing instructional materials, and evaluating instruction to create over 1000 online courses. Effectively evaluated the success of these training programs in terms of learning outcomes and performance improvement.

### **Online & Classroom Instructor 2003- 2005**

*Kaplan College, Mira Costa College, National University, San Diego, CA*

Taught college level students both online and in the classroom on subjects ranging from abnormal psychology to foundations of business management.

### **Course Developer 2003**

*Spectrum Learning (Division of National University) San Diego, CA*

Developed courses on the Blackboard learning management system for National University.

### **Career Counselor/Online & Classroom Instructor 1997 – 2003**

*Coleman College, San Marcos, CA*

Responsible for assisting graduates in finding employment in the high tech industry. Taught students, in pursuit of their Bachelor degree, on a variety of subjects including psychology and business.

## EDUCATION

### **Master's Degree in Education, Instructional Design for E-Learning**

Capella University (2003) *Magna Cum Laude*

### **Master's Degree in Community and Career Counseling**

National University, San Diego, CA (2000) *Magna Cum Laude*

### **Bachelor of Science Degree in Business Management**

California State University, San Marcos, CA (1993) *Cum Laude*

Click the links below to see some examples of completed e-learning projects.

[Department of Defense \(COA Accreditation\)](#)

[Fundamentals of Management](#)

[American Correctional Association on Female Offenders](#)

[Leadership in Management](#)

[Community Health Centers on Neurological Pathophysiology](#)

[Behavioral and Community Health Centers on Infection Control](#)

[Toolkit for Cultural Competence](#)

## EMPLOYMENT HISTORY AND EXPERIENCE

7/97-  
present

### ***Transformation Specialist***

Provide coaching, consultation, mentoring, training and support to individuals and organizations involved in transforming services for people with disabilities, including the following:

- ♦ ***Jay Nolan Community Services:*** Facilitate the development of a values based strategic plan; assist in the transformation of day programs, supported employment and supported living services. Provide training and assistance with customized employment and microenterprise development. Provide coaching and training to management, the supported living team, day and work services personnel, individuals with autism and other disabilities and their circles of support, JNCS board of directors, etc. Provide leadership training for supervisors and directors.
- ♦ ***Center for Self Determination:*** Assist different states and organizations to transform service systems based on the principles of self-determination and inclusion of people with disabilities in all aspects of everyday life including employment; coordinate Center's role in the Florida Freedom Initiative and Self Determination for Texas project. Assist in planning and implementing conferences and training on self determination for the Center, including the 2008 and the 2009 International Cross Disability Conference on Self Determination.
- ♦ ***Essential Learning.com:*** Develop curricula for online training modules related to inclusion, person centered supports and transforming agencies to serve people with disabilities more effectively. Provide consultation on issues related to developmental disabilities supports.
- ♦ ***CAPC, Inc:*** Provide assistance and consultation with microenterprise and customized employment grant project; develop project's strategic plan and evaluation process.
- ♦ ***CIRCL (Connections for Information and Resources on Community Living):*** One of the co-founders of group that provides mentoring, training, focus groups, seminars, networking, etc. in the area of supported living services.
- ♦ ***Arc of Ventura County:*** Assist the management team to transform the agency around person centered principles. Assist day programs and work services to provide supports that are more person centered and meaningful to the participants, including more opportunities to engage in meaningful employment and endeavors that result in valued lives for people with disabilities.
- ♦ ***Tri-Counties Regional Center:*** Assist TCRC to implement their self-determination pilot project. Participate in a project to assist the various stakeholders in the system to develop a unified vision for services to people with developmental disabilities based on a person centered approach with a corresponding QA system. Assist to develop a comprehensive training plan for service coordinators and other TCRC staff.
- ♦ ***Eastern Los Angeles Regional Center:*** Consult on self-determination pilot project, developing implementation strategies, training regional center staff, working with participants. Work with service coordination unit on person centered planning.

- ♦ **San Gabriel Pomona Regional Center:** Assist community recreational programs such as the City of Claremont and Covina YMCA recreation programs to include people with disabilities; provide training to staff on inclusive recreation.
- ♦ **Supported Living Evaluation Project:** Coordinate project to develop an instrument to be used to evaluate supported living providers. Funded by the Department of Developmental Services and North Los Angeles County Regional Center.
- ♦ **Sherry Beamer and Associates:** Consult with day programs, self advocacy groups, parent organizations and regional centers to increase the inclusion of people with disabilities in employment and the everyday life of the community.
- ♦ **Alpha Resource Center:** Assist day program provider to transform their services by developing and implementing a person centered planning and resource development process; consult with them on vision and values driven work.

- 11/87-7/97 **North Los Angeles County Regional Center** *Community Services Supervisor*  
 Van Nuys, CA *Resource Developer*  
 Responsible for resource development, quality assurance and vendoring for residential services, day programs, infant services, family support services, independent living services and supported living. Included developing and implementing the center's supported living program and other person centered types of services, including personalized day programs and family support services. Supervised the Life Quality Assessment project. Facilitated inclusion of children and adults in day care, recreation programs and other community services.
- 1/87-11/87 **Jay Nolan Community Services** *Day Program Manager*  
 Santa Clarita, CA  
 Manager of day program for adults with autism. Included moving the program from a site based workshop to community based work, activities and experiences.
- 7/85-9/86 **Technical Aid Corp./Alternative Care, Inc.** *Director of Behavioral Services*  
 Winchester, MA  
 Supervised team providing behavioral consultation and training to district programs, schools and families.
- 10/84-6/85 **Mystic Valley Mental Health Association** *Behavioral Specialist*  
 Arlington, MA  
 Provided behavioral consultation and training to programs serving people with developmental disabilities and their families. Included residential, day programs, children's services and families.
- 12/79-10/84 **Walnut Street Center** *Behavioral Consultant*  
 Somerville, MA  
 Served on a behavioral treatment and training team for agency serving people with developmental disabilities in residential and day programs.
- 10/75-8/78 **Sunland Center** *Behavior Program Associate*  
 Gainesville, FL  
 Supervised crisis team and day program in a large state developmental center.
- 8/71-11/74 **Cobb County Board of Education** *Classroom Teacher*  
 Smyrna, GA  
 Taught first, second and third grades. Selected "Young Educator of the Year"
- 6/69-6/71 **Alachua County Board of Public Instruction** *Classroom Teacher*  
 Gainesville, FL  
 Taught fifth and sixth grades. Participated in federal project on team teaching.

## EDUCATIONAL HISTORY

Milligan College, TN Major: Psychology	9/65-6/67
University of Florida Major: Elementary Education, B. A. Awarded several academic scholarships Graduated with honors	9/67-3/70
Georgia State University Major: Educational Psychology Coursework completed for M.Ed.	1/74-8/75

## RECENT PRESENTATIONS AND PUBLICATIONS

<b>April 2009</b>	Creating a Meaningful Life; Area Board 10 and Inclusion Institute: Inclusive Life Conference, Los Angeles, CA
<b>Spring 2009</b>	Self-Determination 101 Training Series for Center for Self-Determination: Baltimore, MD; Columbus, OH; Kansas City, MO.
<b>May 2008</b>	Lead organizer and moderator for International Conference on Self Determination, a cross disability, international conference on self determination, Detroit, MI
<b>September 2007</b>	Lead presenter for Work for All conference on microenterprise development for DD Council grant project for Jay Nolan Community Services, Los Angeles, CA
<b>March 2006</b>	Lead Systems Change Planning Coordinator and presenter for Immersion Learning in Self Determination, Center for Self Determination, Dallas, TX
<b>December 2005</b>	Coordinated and conducted training for systems personnel for the Florida Freedom Initiative on self determination and systems change, Tampa, FL
<b>October 2005</b>	Presentation: Service Coordinator's Guide to Supported Living, Supported Life conference, Sacramento, CA
<b>February 2005</b>	Presentations in five districts to introduce the Florida Freedom Initiative, Center for Self-Determination on contract to the Florida Agency for Persons with Disabilities
<b>January 2005</b>	Article: <i>Purposeful Work: Asking the Important Questions</i> , ANCOR Newsletter, January 2005 <a href="http://www.ancor.org/2004/pe/vining_1-05.pdf">http://www.ancor.org/2004/pe/vining_1-05.pdf</a>
<b>December 2004</b>	Lead Systems Change Planning Coordinator and presenter for the Transition Immersion Learning in Self Determination, Center for Self-Determination and the University of Iowa, Chicago, IL
<b>November 2004</b>	TASH Tech full day presentation in Individualized Budgeting, and TASH Tech full day presentation in Self-Determination, the TASH national conference, Reno, NV
<b>October 2004</b>	Basics of Supported Living – From a Regional Center's Perspective., Supported Life Conference; Sacramento, CA  Best Practices in Supported Living; Panel presentation, Supported Life Conference, Sacramento, CA

- September 2004** Immersion Learning in Self Determination, Center for Self Determination, Akron, Ohio
- Critical Elements in a Self Determination Based System, Coalition of Texans with Disabilities Conference, for the Center for Self Determination, Dallas, Texas
- April, 2004** Lead Systems Change Planning Coordinator and presenter for the Center for Self Determination's Immersion Learning in Self-Determination, Atlanta, GA
- April, 2003** Training for all Protection and Advocacy Clients' Rights Advocates in California, on person centered planning and IPP's and supported living services
- March, 2003** Planning facilitator and presenter for the Center for Self Determination's Immersion Learning in Self Determination, Las Vegas, NV
- October, 2002** Self-Determination: What Is It?; invited presentation at Supported Life Conference, Sacramento, CA
- October, 2002** Moving From the Developmental Center to Your Own Home, presentation at Supported Life Conference, Sacramento, CA
- Spring, 2002** Presentations in each of the five California developmental centers on assisting people with disabilities to move from institutions to the community into their own homes using supported living services.
- January, 2001** Fiscal Implications and Impact of Self Determination for Service Providers, invited presentation for California Rehabilitation Association, San Diego, CA

**REFERENCES AVAILABLE UPON REQUEST**

# Edith G. Fierro

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Current Address: 242 East Center St., Covina, CA 91723  
Telephone: (626) 974-6911  
Email: Shu!ammite3@AOL.com

## EMPLOYMENT HISTORY

November 1998-  
Present

Director of Programs/Supported Living and Self Advocacy Services, CAPC, Inc. Whittier, CA

Provide leadership and supervision to Team Coordinators, Staff and consumers, implementation of Supported Living services, Quality Assurance of service delivery, assessments and individual plans of Supported Living service for newly referred consumers as well as consumers receiving other services from our agency. Periodic Service reviews, evaluation and hiring procedures for staff including IHSS workers, implementing policies and procedures as per company's standards, yearly training for all staff, team coordinators and consumers, public relations with funding agency and generic resources, conflict resolution when needed and scheduling. Coordinates annual self-advocacy conferences, trainings and trouble shoots with staff for various self-advocacy groups.

June 1997 -  
November 1998

Team Coordinator, CAPC, Inc. Whittier, CA

Leadership and supervision of staff and consumers, implementation of services to consumers, scheduling of services, monitor caseload, conduct vocational planning meetings, write yearly vocational and individual service plans, coordination of generic resources for consumers, write behavioral assessments and implementation of behavior plans, manage daily problem solving for consumers and staff issues. Provide direct service to consumers as needed. Contact with public service agency, monitor and bill monthly services. Provide on-going support and guidance in the area of self-advocacy.

August 1996 -  
June 1997

Program Manager, CAPC, Inc. Whittier, CA

Supervision and training of case managers and staff, quality assurance of service provision to consumers, coordinate evaluations of staff, responsible for hiring and training of staff and case managers. Daily problem solving for consumer and staff schedules, public relations, read, review and write progress reports, review and develop adaptations for consumers, community integration for individuals with disabilities, appeals process.



March 1984 -

May 1991

Program Aide/ Van Driver, Delhaven Community Center, La Puente  
Working with developmentally disabled adults, organizing and  
managing work crews within the community, Independent  
Living skills and supervision of individuals within a facility setting.

## **COMMUNITY AND PROFESSIONAL DEVELOPMENT**

San Gabriel Pomona Regional Center Vendor Advisory Committee

Whittier Accessibility Committee Member

Sub-Chair for Vendor Advisory Committee Supported  
Living/Independent Living

Institute for Applied Behavior Analysis, Behavior Assessments  
Professional Assault Response Trainer

CPI (Crisis Prevention Intervention) Certified

Volunteer for Correctional Facilities through Visitation and  
Counseling

Renee M Gonzales  
6216 Gregory Ave  
Whittier, CA 90601  
Mobile: 562-236-7268  
E-Mail: gonzalesr@capcinc.org

## EMPLOYMENT HISTORY

- 2007 - Present      Case Manager, CAPC, Inc., Whittier, CA
- Provide leadership to team of staff serving Adults with disabilities in their home, community and at work.  
Coordinate individuals services that centered on their ISP goals.  
Coordinate generic resources for individuals.  
Write ISP reports as required by Regional Centers, Dept. of Rehab.  
Monitor individuals progress towards an improved quality of life.  
Train staff to maximize their skills to provide quality services to individuals.
- 1996-2007      Self Advocacy Facilitator, CAPC, Inc. Whittier, CA
- Worked hand in hand with individuals involved in Self Advocacy groups with organizing their agenda's, keeping minutes of their meetings, and providing support with any follow-up tasks the group(s) may need.  
Assisted the leaders of the group(s) to organize workshops which educated *peer to peer* on issues pertaining to self awareness, women's issues, problem solving and making decisions, understanding Rights and Responsibilities, and distinguishing the importance of advocating for self, others, and issues that affect our community.

## COMMUNITY AND PROFESSIONAL DEVELOPMENT

Communication ( Facilitated Communication)  
CPI (Crisis Prevention Intervention) Certified  
Family Dynamics  
Alzheimer's (UCLA)  
Sensory Awareness  
Self Advocacy  
Literacy Tutor

## EDUCATION:

- High School Diploma, *Pioneer High School. Whittier, CA*

# Joseph E. Mainez

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6323 Comstock Ave, Apt. G, Whittier, CA 90601 | Telephone: 562-964-8844 | Email: Mainez@gmail.com

## **EMPLOYMENT HISTORY**

### **CAPC, Inc.**

**2010 – Present: Case Manager** – Manage a caseload of individuals with ASD, down syndrome or other communication impairments and organized a team of staff to use a goal-oriented approach to support them in achieving their employment or life goals. Work regularly with staff to problem solve any challenges they might face with the individuals they support. Prepare reports for regional centers indicating the progress individuals have made the plan for overcoming barriers. Provide staff training through companywide workshops and one-to-one support sessions. Coordinate/lead a Facilitated Communication group and educated the staff on alternative communication methods and “Best Practice”. Facilitate a weekly self-advocacy group that was created by individuals with ASD and Asperger’s syndrome to help problem solve challenges they may face.

### **ASD Consultancy**

**2009 – 2010: Autism Specialist / Facilitator for therapeutic sessions** – Supported individuals by teaching social skills, alternative methods of communication, independent living skills, nutrition, regulation, as well as, educated families on disabilities and effective problem solving strategies. Created progress reports for regional centers. Worked with individuals with Asperger’s syndrome and autism ages three thru adult.

### **Progressive Resources Inc.**

**2008 – 2009: Adaptive Skills program assistant supervisor / Family Support group leader / Adaptive skills group leader / Communication group leader** – Assigned specialists to meet with individual clients based on client need and specialist abilities. Provided individual supervision of two specialists including coordination of their schedules and assistance regarding new strategies or concerns they may be having with the individuals they support. Worked to create a training program for new adaptive skills specialists and oversaw testing and skills checks each month. I assisted staff members in creating SIR documents and helped ensure the correct regional center policy was followed. Led a community-based group where individuals worked to generalize social, safety and organizational skills into the community. Organized several teen panel presentations for autism-oriented conferences. Presented at an autism conference held in Norco, California on the topic of non-verbal communication and sensory needs. Led a functional communication group and educated the parents on alternative communication methods and “Best Practice”.

**2005 – 2008: Adaptive Skills Specialist / Family Support Group Leader** – Built upon the skills learned in groups and began to assist individuals with autism and other disabilities in-home. Supported individuals by teaching social skills, alternative methods of communication, independent living skills, nutrition, regulation, as well as, educated families on disabilities and effective problem solving strategies. Led a social group by choosing fun activities with different adaptations that helped clients advance toward their goals.

**2003 – 2005: Family support program group assistant** – Assisted group leaders in facilitating social activities to teach social skills to individuals with disabilities (aged three through adulthood). Provide

sensory activities and breaks when needed to assist the group or an individual in regulation. Often, adaptations would need to be made so each individual would have the ability to participate while still benefiting from the concepts taught; this was a skill learned at this time.

**Presbyterian Intercommunity Hospital**

**2002 – 2003: Ambassador (volunteer)** – Learned the hospital layout to assist guests in locating desired destinations. Discharged patients in wheelchairs and delivered supplies and samples to and from different departments.

**COMMUNITY AND PROFESSIONAL DEVELOPMENT**

CPI (Crisis Prevention Intervention) certified trainer (Non-violent physical crisis intervention)

Facilitated Communication trainer

CPR / First Aid certified

Received the 6<sup>th</sup> Annual Jim Gluth Award for Outstanding Service by an Individual to the Autism Community

**EDUCATION**

**2003 – 2005**

USC Health Promotion and Disease Prevention student

**1999 – 2003**

La Serna High School Graduate, Whittier, CA 90605

**ATTACHMENT 1**  
**REQUIRED ATTACHMENT CHECKLIST**

A complete proposal or proposal package will consist of the items identified below. Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.

<b><u>Attachment</u></b>	<b><u>Attachment Name/Description</u></b>
<u>✓</u> Attachment 1	Required Attachment Check List
<u>✓</u> Attachment 2	Proposal/Proposer Certification Sheet
<u>✓</u> Attachment 3	Cost Sheet
<u>✓</u> Attachment 4	Proposer References
<u>✓</u> Attachment 5	Payee Data Record (STD 204) The Payee Data Record can be found on the internet at: <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a>
<u>✓</u> Attachment 6	Contractor Certification Clauses (CCC). The CCC can be found on the Internet at <a href="http://www.ois.dgs.ca.gov/Standard+Language">www.ois.dgs.ca.gov/Standard+Language</a>

**ATTACHMENT 2**  
**PROPOSAL/PROPOSER CERTIFICATION SHEET**

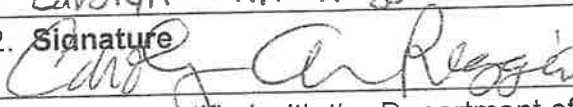
This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package in duplicate with original signatures. The proposal must be transmitted in a sealed envelope in accordance with RFP instructions.

**Do not return Section C, Proposal Requirements and Information (pages 3 through 11) of this RFP.**

**For RFP Primary Only:**

- A. Our all-inclusive cost proposal is submitted in a sealed envelope marked "Cost Proposal - Do Not Open".
- B. Place all required attachments behind this certification sheet.
- C. The signature affixed hereon and dated certifies compliance with all the requirements of this proposal document. The signature below authorizes the verification of this certification.

**An Unsigned Proposal/Proposer Certification Sheet May Be Cause For Rejection**  
**ATTACHMENT 2 (Cont.)**

1. Company Name <b>CAPC Inc</b>	2. Telephone Number <b>(562) 493-8826</b>	2a. Fax Number <b>(562) 493-3826</b>
3. Address <b>7200 Greenleaf Ave #170, Whittier CA 90602</b>		
Indicate your organization type:		
4. <input type="checkbox"/> Sole Proprietorship	5. <input type="checkbox"/> Partnership	6. <input checked="" type="checkbox"/> Corporation
Indicate the applicable employee and/or corporation number:		
7. Federal Employee ID No. (FEIN) <b>95-4389351</b>	8. California Corporation No. <b>C1928586</b>	
9. Indicate applicable license and/or certification information: <b>N/A</b>		
10. Proposer's Name (Print) <b>Carolyn Ann Reggio</b>		11. Title <b>Executive Director</b>
12. Signature 		13. Date <b>April 30, 2013</b>
14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:		
a. California Small Business Enterprise  Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, enter certification number: _____		b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, enter your service code below: _____
<p><b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is</p> <p>_____ Date application was submitted to OSBCR, if an application is _____</p>		

### Completion Instructions for Proposal/Proposer Certification Sheet

Complete the numbered items on the Proposal/Proposer Certification Sheet by following the instructions below.

Item Numbers	Instructions
1, 2, 2a, 3	Must be completed. These items are self-explanatory.
4	Check if your firm is a sole proprietorship. A sole proprietorship is a form of business in which one person owns all the assets of the business in contrast to a partnership and corporation. The sole proprietor is solely liable for all the debts of the business.
5	Check if your firm is a partnership. A partnership is a voluntary agreement between two or more competent persons to place their money, effects, labor, and skill, or some or all of them in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them. An association of two or more persons to carry on, as co-owners, a business for profit.
6	Check if your firm is a corporation. A corporation is an artificial person or legal entity created by or under the authority of the laws of a state or nation, composed, in some rare instances, of a single person and his successors, being the incumbents of a particular office, but ordinarily consisting of an association of numerous individuals.
7	Enter your federal employee tax identification number.
8	Enter your corporation number assigned by the California Secretary of State's Office. This information is used for checking if a corporation is in good standing and qualified to conduct business in California.
9	Complete, if applicable, by indicating the type of license and/or certification that your firm possesses and that is required for the type of services being procured.
10,11 12, 13	Must be completed. These items are self-explanatory.
14	If certified as a California Small Business, place a check in the "yes" box, and enter your certification number on the line. If certified as a Disabled Veterans Business Enterprise, place a check in the "Yes" box and enter your service code on the line. If you are not certified to one or both, place a check in the "No" box. If your certification is pending, enter the date your application was submitted to OSBCR.

**ATTACHMENT 3****COST SHEET**

Line Item	2013-2014	2014-2015	Total
<b>A. Personnel Services</b>			
Project Director 490 hrs @\$62.50/hour	\$ 22,969	\$ 7,656	\$ 30,625
Director of Services 60 hrs @ \$31.93/hour	\$ 1,437	\$ 479	\$ 1,916
Case Manager 204 hrs @ \$19.83/hour	\$ 3,034	\$ 1,011	\$ 4,045
Case Manager 204 hrs @ \$17.00/hour	\$ 2,601	\$ 867	\$ 3,468
Staff Benefits- Medical Insurance	\$ 2,594	\$ 864	\$ 3,458
Payroll Taxes & W/C Insurance	\$ 2,599	\$ 866	\$ 3,465
<b>Total Personnel Services</b>	<b>\$ 35,234</b>	<b>\$ 11,743</b>	<b>\$ 46,977</b>
<b>B. Consultants/Subcontractors</b>			
Self Advocacy Consultants	\$ 525	\$ 175	\$ 700
Video Production	\$ 20,000	\$ 25,000	\$ 45,000
Video Production- 15 minute videos to be posted on website	\$ 5,000	\$ 5,000	\$ 10,000
Brochure translator	\$ 4,000		\$ 4,000
Evaluation consultant	\$ 2,250	\$ 750	\$ 3,000
<b>Total Subcontractors</b>	<b>\$ 31,775</b>	<b>\$ 30,925</b>	<b>\$ 62,700</b>
<b>C. Travel Costs</b>			
Travel to SSAN, SAAC and EFC meetings	\$ 10,500	\$ 3,500	\$ 14,000
<b>Total Travel Costs</b>	<b>\$ 10,500</b>	<b>\$ 3,500</b>	<b>\$ 14,000</b>



**ATTACHMENT 3****COST SHEET**

<b>Line Item</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>Total</b>
<b>D. Operating Costs</b>			
Commissioned photos for brochures	\$ 3,500		\$ 3,500
Printing of multi-language brochures	\$ 10,000		\$ 10,000
Copy paper, supplies, In-Kind Contributions	\$ 3,375	\$ 1,125	\$ 4,500
Business community experts	n/c	n/c	n/c
Rent, phones and office support	n/c	n/c	n/c
<b>Total Operating Costs</b>	<b>\$ 16,875</b>	<b>\$ 1,125</b>	<b>\$ 18,000</b>
<b>E. Administrative Overhead</b>			
	<b>\$ 9,438</b>	<b>\$ 4,729</b>	<b>\$ 14,167</b>
<b>TOTAL CONTRACT</b>	<b>\$ 103,822</b>	<b>\$ 52,022</b>	<b>\$ 155,844</b>

## ATTACHMENT 4

### PROPOSER REFERENCES

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal will cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

#### REFERENCE 1

Name of Firm	East Los Angeles Regional Center	State	CA	Zip Code	91803
Street Address	1000 S Fremont Ave City Alhambra				
Contact Person	GLORIA Wong	Telephone Number	626-299-4700		
Dates of Service	1985 - present	Value or Cost of Service			

#### Brief Description of Service Provided

Long term relationship with service coordinators and their supervisors to advocate for individuals self advocacy. Play an active role on vendor advisory committee to help educate on self advocacy.

#### REFERENCE 2

Name of Firm	Regional Center of Orange County	State	CA	Zip Code	
Street Address	1525 N. Tustin Ave City Santa Ana				
Contact Person	Lanny Keefover	Telephone Number	714-796-5100		
Dates of Service	1999 - present	Value or Cost of Service			

#### Brief Description of Service Provided

Long term relationship with service coordinators and their supervisors to advocate for individuals self advocacy. Partnering to expand services in Orange County.

#### REFERENCE 3

Name of Firm	San Gabriel Pomona Regional Center	State	CA	Zip Code	91768
Street Address	761 Corporate Center City Pomona				
Contact Person	Tim Travis	Telephone Number	909-620-7722		
Dates of Service	1998 - present	Value or Cost of Service			

#### Brief Description of Service Provided

Long term relationship with service coordinators and their supervisors to advocate for individuals self advocacy. Play an active role on vendor advisory committee to help educate on self advocacy.

**PAYEE DATA RECORD**(Required when receiving payment from the State of California in lieu of IRS W-9)  
STD 204 (Rev. 6-2003)

<b>1</b>	<b>INSTRUCTIONS:</b> Complete all information on this form. Sign, date, and return to the State agency (department/office) address shown at the bottom of this page. Prompt return of this <b>fully completed</b> form will prevent delays when processing payments. Information provided in this form will be used by State agencies to prepare Information Returns (1099). See reverse side for more information and Privacy Statement. <b>NOTE:</b> Governmental entities, federal, State, and local (including school districts), are not required to submit this form.		
<b>2</b>	<b>PAYEE'S LEGAL BUSINESS NAME</b> (Type or Print) CAPC, Inc.		
	<b>SOLE PROPRIETOR – ENTER NAME AS SHOWN ON SSN</b> (Last, First, M.I.)		<b>E-MAIL ADDRESS</b> reggioc@capcinc.org
	<b>MAILING ADDRESS</b> 7200 Greenleaf Ave. #170		<b>BUSINESS ADDRESS</b> 7200 Greenleaf Ave. #170
	<b>CITY, STATE, ZIP CODE</b> Whittier, CA 90602		<b>CITY, STATE, ZIP CODE</b> Whittier, CA 90602
<b>3</b>	<b>ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN):</b> <div style="border: 1px solid black; padding: 2px; display: inline-block;">           9 5 - 4 3 8 9 3 5 1         </div>		<b>NOTE:</b> Payment will not be processed without an accompanying taxpayer I.D. number.
<b>PAYEE ENTITY TYPE</b>  <b>CHECK ONE BOX ONLY</b>	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> <b>PARTNERSHIP</b>   <input type="checkbox"/> <b>ESTATE OR TRUST</b> </div> <div style="width: 45%;"> <b>CORPORATION:</b>  <input type="checkbox"/> <b>MEDICAL</b> (e.g., dentistry, psychotherapy, chiropractic, etc.)  <input type="checkbox"/> <b>LEGAL</b> (e.g., attorney services)  <input checked="" type="checkbox"/> <b>EXEMPT</b> (nonprofit)  <input type="checkbox"/> <b>ALL OTHERS</b> </div> </div>		
	<input type="checkbox"/> <b>INDIVIDUAL OR SOLE PROPRIETOR</b> <b>ENTER SOCIAL SECURITY NUMBER:</b> <div style="border: 1px solid black; padding: 2px; display: inline-block; width: 150px;">             - - - - -           </div>		
	(SSN required by authority of California Revenue and Tax Code Section 18646)		
<b>4</b>	<b>PAYEE RESIDENCY STATUS</b>  <input checked="" type="checkbox"/> California resident - Qualified to do business in California or maintains a permanent place of business in California. <input type="checkbox"/> California nonresident (see reverse side) - Payments to nonresidents for services may be subject to State income tax withholding. <div style="margin-left: 40px;"> <input type="checkbox"/> No services performed in California.  <input type="checkbox"/> Copy of Franchise Tax Board waiver of State withholding attached.         </div>		
<b>5</b>	<b>I hereby certify under penalty of perjury that the information provided on this document is true and correct. Should my residency status change, I will promptly notify the State agency below.</b>		
	<b>AUTHORIZED PAYEE REPRESENTATIVE'S NAME</b> (Type or Print) Carolyn Ann Reggio		<b>TITLE</b> Executive Director
	<b>SIGNATURE</b> 	<b>DATE</b> 04/30/2013	<b>TELEPHONE</b> (562) 693-8826
<b>6</b>	<b>Please return completed form to:</b>  <b>Department/Office:</b> State Council on Developmental Disabilities <b>Unit/Section:</b> _____ <b>Mailing Address:</b> 1507 21st Street, Suite 210 <b>City/State/Zip:</b> Sacramento, CA 95811 <b>Telephone:</b> (____) _____ <b>Fax:</b> (____) _____ <b>E-mail Address:</b> kristie.allensworth@scdd.ca.gov		

**PAYEE DATA RECORD**

STD. 204 (Rev. 6-2003) (REVERSE)


**Requirement to Complete Payee Data Record, STD. 204**

<b>1</b>	<p>A completed Payee Data Record, STD. 204, is required for payments to all non-governmental entities and will be kept on file at each State agency. Since each State agency with which you do business must have a separate STD. 204 on file, it is possible for a payee to receive this form from various State agencies.</p> <p>Payees who do not wish to complete the STD. 204 may elect to not do business with the State. If the payee does not complete the STD. 204 and the required payee data is not otherwise provided, payment may be reduced for federal backup withholding and nonresident State income tax withholding. Amounts reported on Information Returns (1099) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.</p>								
<b>2</b>	<p>Enter the payee's legal business name. Sole proprietorships must also include the owner's full name. An individual must list his/her full name. The mailing address should be the address at which the payee chooses to receive correspondence. Do not enter payment address or lock box information here.</p>								
<b>3</b>	<p>Check the box that corresponds to the payee business type. Check only one box. Corporations must check the box that identifies the type of corporation. The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State provide their Taxpayer Identification Number (TIN). The TIN is required by the California Revenue and Taxation Code Section 18646 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a).</p> <p>The TIN for individuals and sole proprietorships is the Social Security Number (SSN). Only partnerships, estates, trusts, and corporations will enter their Federal Employer Identification Number (FEIN).</p>								
<b>4</b>	<p><b><u>Are you a California resident or nonresident?</u></b></p> <p>A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.</p> <p>A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.</p> <p>For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.</p> <p>Payments to all nonresidents may be subject to withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.</p> <p>For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below:</p> <table border="0"> <tr> <td>Withholding Services and Compliance Section:</td> <td>1-888-792-4900</td> <td>E-mail address:</td> <td>wscs.gen@ftb.ca.gov</td> </tr> <tr> <td>For hearing impaired with TDD, call:</td> <td>1-800-822-6268</td> <td>Website:</td> <td>www.ftb.ca.gov</td> </tr> </table>	Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov	For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov
Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov						
For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov						
<b>5</b>	<p>Provide the name, title, signature, and telephone number of the individual completing this form. Provide the date the form was completed.</p>								
<b>6</b>	<p>This section must be completed by the State agency requesting the STD. 204.</p>								
	<p><b><u>Privacy Statement</u></b></p> <p>Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.</p> <p>It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes noncompliance penalties of up to \$20,000.</p> <p>You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the State agency(ies) with which you transact that business.</p> <p>All questions should be referred to the requesting State agency listed on the bottom front of this form.</p>								

CCC-307

**CERTIFICATION**

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

<i>Contractor/Bidder Firm Name (Printed)</i> CAPC Inc.		95-4389351
<i>By (Authorized Signature)</i> 		
<i>Printed Name and Title of Person Signing</i> Carolyn Ann Reggio, Executive Director		
<i>Date Executed</i> April 30, 2013		<i>Executed in the County of</i> Los Angeles

**CONTRACTOR CERTIFICATION CLAUSES**

1. STATEMENT OF COMPLIANCE: Contractor has, unless exempted, complied with the nondiscrimination program requirements. (Gov. Code §12990 (a-f) and CCR, Title 2, Section 8103) (Not applicable to public entities.)

2. DRUG-FREE WORKPLACE REQUIREMENTS: Contractor will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.

b. Establish a Drug-Free Awareness Program to inform employees about:

- 1) the dangers of drug abuse in the workplace;
- 2) the person's or organization's policy of maintaining a drug-free workplace;
- 3) any available counseling, rehabilitation and employee assistance programs; and,
- 4) penalties that may be imposed upon employees for drug abuse violations.

c. Every employee who works on the proposed Agreement will:

- 1) receive a copy of the company's drug-free workplace policy statement; and,
- 2) agree to abide by the terms of the company's statement as a condition of employment on the Agreement.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both and Contractor may be ineligible for award of any future State agreements if the department determines that any of the following has occurred: the Contractor has made false certification, or violated the

certification by failing to carry out the requirements as noted above. (Gov. Code §8350 et seq.)

3. NATIONAL LABOR RELATIONS BOARD CERTIFICATION: Contractor certifies that no more than one (1) final unappealable finding of contempt of court by a Federal court has been issued against Contractor within the immediately preceding two-year period because of Contractor's failure to comply with an order of a Federal court, which orders Contractor to comply with an order of the National Labor Relations Board. (Pub. Contract Code §10296) (Not applicable to public entities.)

4. CONTRACTS FOR LEGAL SERVICES \$50,000 OR MORE- PRO BONO REQUIREMENT: Contractor hereby certifies that contractor will comply with the requirements of Section 6072 of the Business and Professions Code, effective January 1, 2003.

Contractor agrees to make a good faith effort to provide a minimum number of hours of pro bono legal services during each year of the contract equal to the lesser of 30 multiplied by the number of full time attorneys in the firm's offices in the State, with the number of hours prorated on an actual day basis for any contract period of less than a full year or 10% of its contract with the State.

Failure to make a good faith effort may be cause for non-renewal of a state contract for legal services, and may be taken into account when determining the award of future contracts with the State for legal services.

5. EXPATRIATE CORPORATIONS: Contractor hereby declares that it is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code Section 10286 and 10286.1, and is eligible to contract with the State of California.

6. SWEATFREE CODE OF CONDUCT:

a. All Contractors contracting for the procurement or laundering of apparel, garments or corresponding accessories, or the procurement of equipment, materials, or supplies, other than procurement related to a public works contract, declare under penalty of perjury that no apparel, garments or corresponding accessories, equipment, materials, or supplies furnished to the state pursuant to the contract have been laundered or produced in whole or in part by sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor, or with the benefit of sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor. The contractor further declares under penalty of perjury that they adhere to the Sweatfree Code of Conduct as set forth on the California Department of Industrial Relations website located at [www.dir.ca.gov](http://www.dir.ca.gov), and Public Contract Code Section 6108.

b. The contractor agrees to cooperate fully in providing reasonable access to the contractor's records, documents, agents or employees, or premises if reasonably required by authorized officials of the contracting agency, the Department of Industrial Relations,

or the Department of Justice to determine the contractor's compliance with the requirements under paragraph (a).

7. DOMESTIC PARTNERS: For contracts over \$100,000 executed or amended after January 1, 2007, the contractor certifies that contractor is in compliance with Public Contract Code section 10295.3.

## **DOING BUSINESS WITH THE STATE OF CALIFORNIA**

The following laws apply to persons or entities doing business with the State of California.

1. CONFLICT OF INTEREST: Contractor needs to be aware of the following provisions regarding current or former state employees. If Contractor has any questions on the status of any person rendering services or involved with the Agreement, the awarding agency must be contacted immediately for clarification.

Current State Employees (Pub. Contract Code §10410):

- 1). No officer or employee shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest and which is sponsored or funded by any state agency, unless the employment, activity or enterprise is required as a condition of regular state employment.
- 2). No officer or employee shall contract on his or her own behalf as an independent contractor with any state agency to provide goods or services.

Former State Employees (Pub. Contract Code §10411):

- 1). For the two-year period from the date he or she left state employment, no former state officer or employee may enter into a contract in which he or she engaged in any of the negotiations, transactions, planning, arrangements or any part of the decision-making process relevant to the contract while employed in any capacity by any state agency.
- 2). For the twelve-month period from the date he or she left state employment, no former state officer or employee may enter into a contract with any state agency if he or she was employed by that state agency in a policy-making position in the same general subject area as the proposed contract within the 12-month period prior to his or her leaving state service.

If Contractor violates any provisions of above paragraphs, such action by Contractor shall render this Agreement void. (Pub. Contract Code §10420)

Members of boards and commissions are exempt from this section if they do not receive payment other than payment of each meeting of the board or commission, payment for preparatory time and payment for per diem. (Pub. Contract Code §10430 (e))

2. LABOR CODE/WORKERS' COMPENSATION: Contractor needs to be aware of the provisions which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions, and Contractor affirms to comply with such provisions before commencing the performance of the work of this Agreement. (Labor Code Section 3700)

3. AMERICANS WITH DISABILITIES ACT: Contractor assures the State that it complies with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to the ADA. (42 U.S.C. 12101 et seq.)

4. CONTRACTOR NAME CHANGE: An amendment is required to change the Contractor's name as listed on this Agreement. Upon receipt of legal documentation of the name change the State will process the amendment. Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.

5. CORPORATE QUALIFICATIONS TO DO BUSINESS IN CALIFORNIA:

a. When agreements are to be performed in the state by corporations, the contracting agencies will be verifying that the contractor is currently qualified to do business in California in order to ensure that all obligations due to the state are fulfilled.

b. "Doing business" is defined in R&TC Section 23101 as actively engaging in any transaction for the purpose of financial or pecuniary gain or profit. Although there are some statutory exceptions to taxation, rarely will a corporate contractor performing within the state not be subject to the franchise tax.

c. Both domestic and foreign corporations (those incorporated outside of California) must be in good standing in order to be qualified to do business in California. Agencies will determine whether a corporation is in good standing by calling the Office of the Secretary of State.

6. RESOLUTION: A county, city, district, or other local public body must provide the State with a copy of a resolution, order, motion, or ordinance of the local governing body which by law has authority to enter into an agreement, authorizing execution of the agreement.

7. AIR OR WATER POLLUTION VIOLATION: Under the State laws, the Contractor shall not be: (1) in violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district; (2) subject to cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or (3) finally determined to be in violation of provisions of federal law relating to air or water pollution.

8. PAYEE DATA RECORD FORM STD. 204: This form must be completed by all contractors that are not another state agency or other governmental entity.





## **TRAINING • EDUCATION • EMPOWERMENT**

State Council On Developmental Disabilities  
1507 21<sup>st</sup> Street, Suite 210  
Sacramento, CA 95811

April 26<sup>th</sup>, 2013

Dear Kristie Allensworth,

Get Safe is pleased to present this proposal for your review. We look forward to partnering with you to provide a self-advocacy support program that promotes confidence and independence skills in persons with developmental disabilities called *Get Safe's Self-Advocacy Support Program: Leading Self, Leading Others*. This program will support, prepare, and cultivate self-advocates who have shown interest and to be intimately involved in their communities. The ultimate goal of this program is to support self-advocates in becoming influential leaders and fostering community partnerships that can lead to systematic changes and improvements not only in their lives, but also in the quality of life for all people living with developmental disabilities.

The *Get Safe Self-Advocacy Support Program* has already had great success with its California pilot groups in Bishop, Canyon Springs and Orange County. We have already seen dramatic improvements in participants' confidence and independence skills. Get Safe has seen measurable success in the past, and we are now seeking to reach more people throughout the state. Our proposal requests \$159,414.00 in funding to obtain the facilitation and support, supplemental materials, and technological communication tools to equip the identified self-advocacy groups with a replicable training to ultimately develop strong, self-sufficient leaders.

We have carefully read and understand all the provisions in the RFP and agree to be bound by them. We fully read and reviewed the terms and conditions as stated in the State Contracting Requirements, attached to the RFP, and, that by submitting a response, understand that this document represents the agreement that we will be expected to execute if we are successfully awarded a Cycle 35 CPDG from the SCDD.

Thank you,



Stuart Haskin  
Executive Director, GetSafe™

[stuart@GetSafeUSA.com](mailto:stuart@GetSafeUSA.com)  
714 834-0050 x.105



**SELF-ADVOCACY SUPPORT  
PROGRAM: LEADING SELF,  
LEADING OTHERS**

**[www.getsafeusa.com](http://www.getsafeusa.com)**

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Get Safe is an organization that specializes in the development and instruction of workshops in personal safety, sexual assault prevention, health education, self-defense, and violence prevention. A long-standing body of Get Safe's work has centered on the unique personal safety and systematic issues faced by persons with developmental disabilities. For the past 15 years, Get Safe has successfully worked with Regional Centers and Area Boards throughout California, to fulfill its mission of helping persons with disabilities lead stronger, safer, and more independent lives. In recent endeavors, Get Safe has worked with various Area Boards to create more opportunities for self-advocacy, and help expand a stronger leadership core in the developmentally disabled community. Get Safe believes that developing and cultivating self-advocates in the disability-advocacy arena is the key to creating influential leaders and partnerships that can lead to systematic changes and improvements in the lives of this population.

Get Safe's service philosophy is one that promotes confidence and independence skills in persons with developmental disabilities so they may make meaningful choices and take control in their daily lives. Proposed as a year-long program, *Get Safe's Self-Advocacy Support Program: Leading Self, Leading Others* program will support, prepare, and cultivate self-advocates who are more interested and intimately involved in their communities by discussing topics, concerns, and strategic resolutions most relevant to their lives. Built as a training module that can ultimately be replicated and delivered by self-advocates to educate others in their networks and communities, this program will use an empowerment-centered teaching approach, tailored for persons with disabilities to find their voices and learn how to become true self-advocates.

The training and support program will provide continued learning and networking opportunities for the identified self-advocacy groups (SSAN, SAAC, EFC). Identified self-advocates will learn how to better understand goals and objectives of the State Council Plan, how to make steps towards accomplishing those goals, and will be prepared for participation in self-advocacy meetings. The program will address various aspects of implementing and sustaining a self-advocacy group, from interpersonal communication issues to aspects of leadership and mentorship in their communities. Four leadership trainings will be held on a quarterly basis to provide topical learning objectives, as well as networking opportunities for the groups. Additional supports and electronic training guides containing social media marketing and communication skills to facilitate group cohesion and success will be provided for dissemination to participants.

It is crucial to the success of these implementation efforts that participants are networked with other self-advocates that have been through similar group formation processes and can provide the invaluable perspective of how to make an idea into a working reality. Get Safe has worked throughout California with a variety of local and state agencies and representatives and therefore is uniquely qualified to assist in these networking and mentoring aspects. A formative evaluation plan as well as continual contact with SCDD staff and members will also ensure that the program is effectively meeting the needs and concerns of the community, and will also be a determining factor in the success and overall evaluation of the project. It is anticipated that exponential numbers of persons with developmental disabilities, and the general community, will be greatly impacted by the implementation of these cohesive self-advocacy groups, leading to a higher quality of living and overall life experience.

## **AGENCY QUALIFICATIONS**

Get Safe specializes in the development and execution of fun, innovative and proven training workshops that make a real-world difference in the lives of its clients and students. While Get Safe has expanded its training, education and advocacy services over the years to include safety and awareness training for victims of violent crime and assaults, victims of domestic violence, educational institutions, and corporations across the nation, in recent years, the agency has become best-known throughout the community for its training, assessment, and advocacy services tailored to people with developmental disabilities, their families, and staff regarding violence prevention, intervention, and self-advocacy. Get Safe can accommodate almost any person's ability, from wheelchair safety, to utilizing a cane, nonverbal, hearing and vision impairment. As a vendor-provider for the 21 California regional centers, Get Safe works closely with numerous regional centers in California to provide services to more than 50,000 persons with developmental disabilities, their caregivers, and their professional staff; from this extensive experience, Get Safe has developed a series of programs that address and meet the specific needs of these populations and successfully translate the message of safety, leadership, and empowerment to its specific audience by any and all means possible.

Get Safe has earned its reputation as the premier agency of choice for Area Boards, Regional Centers, school districts, and workplace/day program environments throughout California; the curricula and trainings are a direct reflection of Get Safe's experience in the development and facilitation of hundreds of conferences, trainings, and seminars for special education classes, day programs and residential facilities, as well as one-on-one trainings. Get Safe's empowerment-centered teaching approach helps persons with disabilities find their voices and learn how to become true self-advocates. Since 2002, Get Safe has hosted annual self-advocacy conferences that offer people with developmental disabilities the opportunity to meet their peers, discuss ideas and concerns, and learn about leadership. From teen conferences, focused on encouraging a safe and positive transition into adulthood, to adult conferences promoting social inclusion opportunities and access to community resources, the importance of becoming self-advocates and speaking up for their needs and rights is always a staple of all of these events; Get Safe believes that developing and cultivating self-advocates in the disability-advocacy arena is the key to creating influential leaders and partnerships that can lead to systematic changes and improvements in the lives of this population.

Get Safe has already had success in the past creating and facilitating self-advocacy groups, most notably in Bishop, CA, in Canyon Springs, CA, and in Orange County, CA. Armed with funding from SCDD, Get Safe was challenged to create these successful, independent self-advocacy groups; the team saw enormous potential in a bowling club in Bishop, CA that had previously showed interest in becoming self-advocates, but had little direction or leadership. However, after going through a Get Safe leadership boot camp, the bowling club went from collecting donations in a cup, to the Eastern Sierra Self-Advocacy Network (ESSAN)—an established cross-disability self-advocacy group that now generates its own refined fundraising opportunities and actively volunteers in

the community. Since the group's creation, the Get Safe Team traveled to Bishop several times and joined in on weekly conference calls to discuss goals, ideas, and concerns with the group's leaders. Emphasis on social media and technological networking tools were regularly imparted to the group, including bi-weekly conference calls and web-cam meetings (utilizing Skype and Windows Live Messenger). Get Safe acquired a website domain of the group, and also helped them start up and manage their own FaceBook page, which proved to be especially beneficial in the planning and execution of their fundraising activities. Following this tested formula that combines respect with the understanding that "simplicity is key," Get Safe now uses ESSAN as a successful template for other groups; the same formula was used to great avail at the closed-facility in Canyon Springs, as well as in a general community setting in Orange County, proving that Get Safe's approach and formula for creating and facilitating self-advocacy groups can be successful in both open and closed communities.

Get Safe has also successfully facilitated relationships between community agencies, Area Boards, and other advocacy groups in counties that previously had minimal contact or communication with one another. Get Safe holds seats on the Regional Center of Orange County's Criminal Issues Committee and the Senator's Autism Task Force, ensuring Get Safe has intimate involvement and stays up-to-date with issues specific to the developmentally disabled community. Executive Director Stuart Haskin is also a highly requested guest speaker in the community and has provided workshops for a variety of national conferences related to advocacy and safety for persons with disabilities; most recently, Haskin traveled to Hawaii for the 28th annual Pac Rim Conference held in March. He has written and produced award-winning Public Service Announcements (PSAs), and has presented to the California Crime Prevention Association and conducted the "Becoming a Better Advocate: Communication, Prevention and Intervention Strategies to Assist Victims of Violence, Including Those with Disabilities" Workshop at the 38th annual National Organization for Victim Assistance in San Diego. As an Orange County Sergeant Reserve Deputy Sheriff, Haskin has also used his knowledge and experience to develop programs and resources that encourage better communications and understanding for persons with developmental disabilities among law enforcement agencies and other professionals; to this endeavor, Haskin recently produced training DVDs used to educate law enforcement personnel, fire authority personnel, crisis intervention teams, district attorneys, and other professionals to understand certain behaviors persons with developmental disabilities may demonstrate and how improved communications can allow staff to perform their jobs in a safer and more effective manner.

### **PROGRAM SERVICES**

Through experience gained from years of teaching, facilitating and mentoring self-advocacy conferences, as well as individual and group trainings, Get Safe has developed a very successful and interactive approach to addressing the issues that are most prevalent to this specialized population. Built as a training module that can ultimately be replicated and delivered by self-advocates to educate others in their networks and communities, *Get Safe's Self-Advocacy Support Program: Leading Self, Leading Others*, will provide participants with the tools needed to create and facilitate



self-advocacy groups, as well mentoring skills that will ultimately allow them to live more fulfilling lives while becoming leaders in their respective communities.

### ***Goals and Objectives***

Get Safe's service philosophy is one that promotes confidence and independence skills in persons with developmental disabilities so they may make meaningful choices and take control in their daily lives, thereby increasing their overall quality of life and feeling of purpose and contribution to the wider community. As such, the over-arching goal of the program is to prepare and cultivate self-advocates who are more interested and intimately involved in their communities by discussing topics, concerns, and strategic resolutions most relevant to their lives. Get Safe will ensure that the topics and content of support and facilitation services, training presentations, written and alternative materials, and follow-up group observations will meet the following objectives:

- Assist self-advocates in exercising choice in their lives while building critical and durable relationships with other individuals through self-advocacy and mentoring
- Promote leadership and interpersonal communication skills
- Expose self-advocates to continued learning activities and networking opportunities with real-world relevance and application
- Promote the integration of persons with developmental disabilities into mainstream society to the fullest extent possible
- Strengthen self-advocates' long-term support systems and positive contributions to the larger community
- Assist self-advocates in connecting with other self-advocates and legislators throughout the state
- Enhance existing/develop leadership and advocacy skills learning materials
- Integrate training presentations, materials, and concepts into a training module that can be replicated and delivered by self-advocates to their networks and peers on a local level.

### ***Implementation Strategies***

Get Safe will provide ongoing support services and leadership training for identified self-advocacy groups (SSAN, SAAC, EFC) from 10/1/2013 through 9/30/2014. In accordance with SCDD initiative to always maintain and promote self-advocacy, one of Get Safe's most identifiable strategies is to provide participants with supportive and instructional content that will enable them to create, recruit, and facilitate their own self-advocacy groups. The program will also help participants refine and direct these skills and interests. Get Safe will ensure that all program services provided to each identified self-advocacy group will build towards the formation and implementation of a replicable, training module that can be delivered by these self-advocates to educate others. The program services will include assistance to each group in the following areas:

#### **1. Facilitation and Support**

- In the development and administration of fundamental network/committee materials (i.e., meeting agendas, strategic plans, goals).

- In the logistical aspects of group meetings through follow-up group observations, working with group leaders to organize, schedule and promote initial meetings.
- Once the group goals are clearly established, additional support services will focus on specific aspects of organizing, marketing, branding and facilitating the groups themselves.
- Meeting agendas and supplemental materials will be reviewed prior to each group's formal meetings, so as to prepare self-advocates to fully participate and contribute in their respective meetings.
- Provide additional support, insight, refinement of social-skills and other valuable indirect guidance that will promote a higher retention rate and success in the actual implementation of meetings.
- Observe group meetings and help facilitate a positive experience, when needed. Additional guidance, support and mentoring will be provided on an as-needed basis.
- Collaborate with State Council staff on coordinating aspects of regional, state, and online meetings.

## 2. Quarterly Leadership Training Presentations

- Create **four (4) training presentations** that will reinforce the material and skills needed to sustain a successful self-advocacy group, in collaboration with current designated self-advocates.
- Instill the understanding that in order to lead others, participants must first learn how to lead themselves. This theme will continue to be relayed to participants throughout the different course topics, thereby ensuring consistency, retention and an overall understanding of how to meaningfully live this message.
- Interactive exercises and role-play scenarios will assist participants in identifying their relevant strengths and areas of interest or concern that can then be translated into a group purpose and mission.
- Topics and content of the quarterly trainings aimed at enhancing relevant skills across various domains. Get Safe will ensure that workshop/session topics are relevant to the creation, implementation and sustainability of identified self-advocacy groups.
- Although specific topics will be addressed, the trainings are also a forum for participants to share their personal challenges and concerns, therefore content may vary based on the immediate needs of each group.
- Quarterly trainings will utilize group activities that will promote networking and relationship building amongst the attendees.
- Several respected members of the persons with disabilities community, who are also self-advocates, will serve as "Peer Educators," with responsibilities that range from consultation to guest speaking, to provide first-hand experience of the challenges and successes of being a self-advocate.
- Each session will also provide relevant support materials and will conclude with lists of actionable items for each member that will serve as a basis for

follow up and additional assistance by Get Safe staff, both remotely and through the allotted group meeting follow ups.

### 3. Supplemental Materials

- In development and creation of supplemental materials and supports, as requested and/or required by each self-advocacy group.
- Materials will be made available in a variety of formats (e.g., electronic, hard file distribution).
- Written supplemental materials will be based on a people-first and plain language framework.
- As requested by each self-advocacy group, supplemental materials will include information packets, brochures, handouts, and supports for social media outreach and related skills to ensure group communication and overall success.
- Upon request of SCDD, Get Safe will produce two 15-min. video products with plain language learning guide for posting on the SCDD website.

### 4. Technological Communications

- Included within the training sessions and facilitation services, Get Safe will focus on assisting self-advocates with learning to access and utilize technology to promote group activities, membership, and communications. Discussion will include, but is not limited to, how to use social media (Facebook, Twitter), email, virtual communications (Skype, teleconferencing) and hard media devices (flash drives, DVDs, videos). Get Safe will assist in identifying and establishing the most appropriate technological/virtual communication options for each group, ensure self-advocates are able to use identified means of communication throughout program. New and additional technological options may be implemented, as required and/or desired by group members.

### ***Anticipated Outcomes***

Because this population is often marginalized and underestimated in their abilities to effect change and speak up for themselves, the implementation of this leadership boot camp is not only a necessity in creating long-reaching effects, but also has the potential to create profoundly positive impacts on other self-advocates and the community as a whole. *Get Safe's Self-Advocacy Support Program: Leading Self, Leading Others* will conclude with the completion of the previously discussed implementation strategies (Please see Appendix A for Work Plan Timeline). The following are the anticipated outcomes expected at program completion:

- Self-advocates express awareness of the importance of community involvement
- Self-advocates express an understanding of the relevancy of self-advocacy to their lives and to safer community involvement
- Self-advocates demonstrate improved skills and attitudes towards leadership, self-advocacy, and mentorship
- Self-advocates utilize personal strengths and areas of interest as related to group formation and execution

- Self-advocates identify successes of the group process and set goals for ongoing involvement past the funding period

### **OUTCOME-ORIENTED EVALUATION PLAN**

Success of this program model may lead the way for additional efforts in other areas of the state to identify, create, and implement successful community leaders and self-advocacy groups. A formative evaluation plan will be used to help determine how the program is doing while it is in progress (*Please see Appendix B for Evaluation Plan Summary*). Measures of success of the program will be determined on an ongoing basis through continual feedback from participants, SCDD staff and members, Area Board members, and other relevant parties within the community. The information collected can identify issues of interest that may have been overlooked during the planning phase, and can help make changes as the program is taking form. Success will also be assessed through the use of established intermediate indicators. These intermediate indicators are what program evaluation staff would expect to see as the program is progressing towards objectives and, ultimately, the anticipated outcomes. The following intermediate indicators will be included:

- Number of self-advocates that participate in training sessions discussions and follow-up group interactions
- Self-advocates ask questions that indicate they are linking leadership concepts with their everyday lives
- Self-advocates refer to program experiences during meetings
- Self-advocates demonstrate greater leadership in activities; take initiative in organizing/doing activities
- Self-advocates implement concepts related to group purpose, common goals, and mission
- Self-advocates' use of outreach tools, including social media, networking, group branding, and technological communication tools

At the closing of the program, a formal evaluation report will be generated. This report will included evaluation results in terms of program goals and objectives, tactics used to ensure the program was well-implemented, and a plan for using the evaluation to improve future implementations of the program.

<b>Appendix A: WORK PLAN TIMELINE</b>	
<b>PHASE I: DEVELOPMENT</b>	<b>MONTHS 1 - 2 (Oct. 1<sup>st</sup> – Nov. 30<sup>th</sup>)</b>
<ul style="list-style-type: none"> <li>• Upon Contract Award Notification, meet with SCDD personnel and/or secure contractual agreement.</li> </ul>	
<ul style="list-style-type: none"> <li>• Begin negotiation of training site related specifications, in coordination with FDD staff</li> </ul>	
<ul style="list-style-type: none"> <li>• Begin staffing process &amp; establish key personnel. Position qualified staff on project.</li> </ul>	
<ul style="list-style-type: none"> <li>• Ensure schedules for training/familiarization/orientation with curriculum and general project timelines are not delayed nor disrupted.</li> </ul>	
<ul style="list-style-type: none"> <li>• Ensure training specialists are ready &amp; knowledgeable in specifics of training curriculum</li> </ul>	
<ul style="list-style-type: none"> <li>• Begin partnering relationships with SCDD, self-advocates, and community resources</li> </ul>	
<ul style="list-style-type: none"> <li>• Identify and establish technological/virtual communication options for each group; ensure self-advocates are ready and able to use identified means of communication</li> </ul>	
<ul style="list-style-type: none"> <li>• Begin assisting groups with development and administration of logistical materials (i.e., meeting agendas, strategic plans, goals).</li> </ul>	
<ul style="list-style-type: none"> <li>• Collaborate with self-advocates to develop topics and content for 4 quarterly training presentations.</li> </ul>	
<b>PHASE II: IMPLEMENTATION</b>	<b>MONTHS 3 - 12 (Dec. 1<sup>st</sup> – Sept. 30<sup>th</sup>)</b>
<ul style="list-style-type: none"> <li>• Coordinate with sites/organizations to schedule training sessions</li> </ul>	
<ul style="list-style-type: none"> <li>• Begin on-going scheduling and execution of training workshops, follow-ups, and support services, until specifics of full program/service design and contract have been fulfilled</li> </ul>	
<ul style="list-style-type: none"> <li>• Develop, create, &amp; produce supplemental materials and supports on an ongoing basis, as requested and/or required by each self-advocacy group.</li> </ul>	
<ul style="list-style-type: none"> <li>• Review meeting agendas and supplemental materials prior to each group's formal meetings.</li> </ul>	
<ul style="list-style-type: none"> <li>• Observe group meetings and facilitate group interactions, providing additional guidance, support, and mentoring on an ongoing and as-needed basis per group.</li> </ul>	
<b>PHASE III: CLOSURE</b>	<b>MONTH 12 (Sept. 1<sup>st</sup> – Sept. 30<sup>th</sup>)</b>
<ul style="list-style-type: none"> <li>• Complete implementation strategies.</li> </ul>	
<ul style="list-style-type: none"> <li>• Complete Final Summary Report that includes: project goals &amp; objectives, summary of training services, anticipated outcomes, and recommendations to assist SCDD in future endeavors</li> </ul>	

## Appendix B: OUTCOME ORIENTED EVALUATION PLAN

**Goal:** Prepare and cultivate self-advocates who are more interested and intimately involved in their communities

### OBJECTIVES

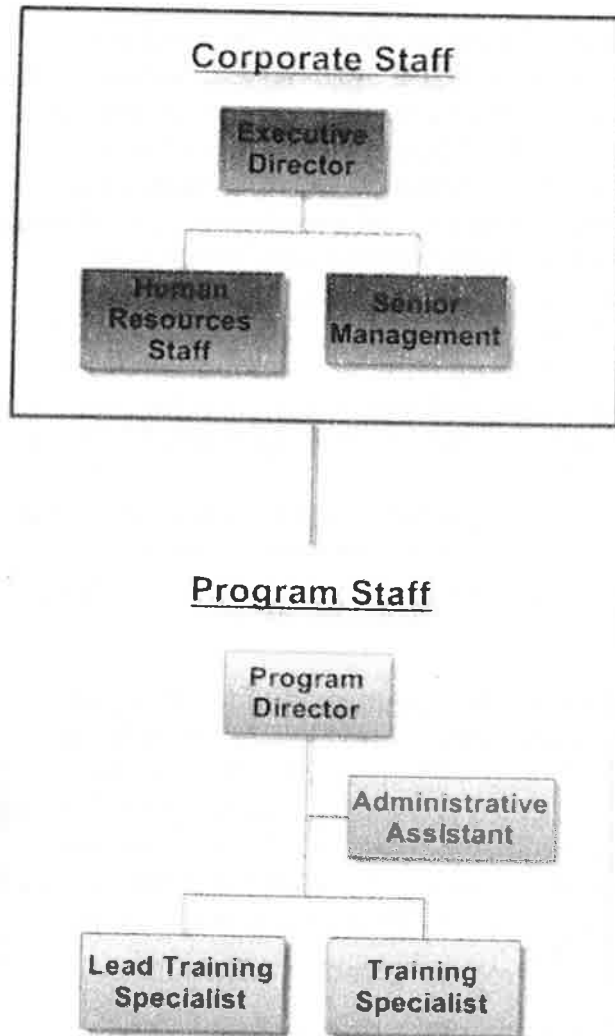
- Assist self-advocates in exercising choice in their lives while building critical and durable relationships with other individuals through self-advocacy and mentoring
- Promote leadership and interpersonal communication skills
- Expose self-advocates to continued learning activities and networking opportunities with real-world relevance and application
- Promote the integration of consumers into mainstream society to the fullest extent possible
- Strengthen self-advocates' long-term support systems and positive contributions to the larger community
- Assist self-advocates in connecting with other self-advocates throughout the state
- Enhance existing/develop leadership and advocacy skills learning materials
- Integrate training presentations, materials, and concepts into a training module that can be replicated and delivered by self-advocates to their networks and peers on a local level

<b>Implementation Strategies</b>	<ol style="list-style-type: none"> <li>1. Facilitation and support with logistical aspects of group meetings.</li> <li>2. Follow up group meeting observations, for ongoing consistency, and affiliated support efforts to implement the groups</li> <li>3. Four trainings held on a quarterly basis</li> <li>4. Access to Peer Educators, respected members of the Persons with Disabilities community who have had success in self-advocacy group formation and efforts</li> <li>5. Supplemental materials and supports for related skills to ensure group communication and overall success, included written, plain language materials, video products, and promotional materials in a variety of formats</li> <li>6. Assistance and instruction on utilizing technology as a means to enhance group communications</li> </ol>
<b>Intermediate Indicators</b>	<ul style="list-style-type: none"> <li>➤ Number of self-advocates that participate in training sessions discussions and follow-up group interactions.</li> <li>➤ Self-advocates ask questions that indicate they are linking leadership concepts with their everyday lives.</li> <li>➤ Self-advocates refer to program experiences during meetings.</li> <li>➤ Self-advocates demonstrate greater leadership in activities; take initiative in organizing/doing activities.</li> <li>➤ Self-advocates implement concepts related to group purpose, common goals, and mission.</li> <li>➤ Self-advocates' use of outreach tools, including social media, networking, group branding, and technological communication tools.</li> </ul>
<b>Final Outcomes</b>	<ul style="list-style-type: none"> <li>➤ Self-advocates express awareness of the importance of community involvement</li> <li>➤ Self-advocates express an understanding of the relevancy of self-advocacy to their lives and to safer community involvement</li> <li>➤ Self-advocates demonstrate improved skills and attitudes towards leadership, self-advocacy, and mentorship</li> <li>➤ Self-advocates utilize personal strengths and areas of interest as related to group formation and execution</li> <li>➤ Self-advocates identify successes of the group process and set goals for ongoing involvement past the funding period</li> </ul>

## USE OF PERSONNEL

Get Safe has created an integrated model for support staff and infrastructure to facilitate the scheduling, documentation, and effective management of contracted services. As an organization providing education, training and empowerment to a diversity of populations, Get Safe utilizes proven processes, procedures, and metrics against which personal and professional progress can be measured, within a clearly defined structure for orientation, training, and certification. In addition, corporate staff, located in Orange County, California, is available to assist by providing a full array of human resources, administrative, and management activities. To relieve on-site personnel from general administrative burdens and enable them to focus on the immediate on-site training operations, corporate staff will provide support activities, including budget and records management, personnel administration, cost accounting, and other services necessary to administer a full-service program. Corporate staff will be responsible for the selection and on-boarding of all Get Safe employees assigned to the program.

### Organizational Chart



**APPROVED VENDOR FOR ALL**

**21** REGIONAL CENTERS

**ONGOING SERVICES SINCE 2007**

Inland  
Orange County  
Westside  
Harbor  
Lantern

**PROVIDES SERVICES TO 50,000+** persons with developmental disabilities, their caregivers, and professional staff

 = 1,000

**ONGOING SERVICES SINCE 2011:**

Area Boards 9, 10, 11, 12, 13

Map showing service areas: San Luis Obispo, Santa Barbara, Ventura, Los Angeles, Inyo, Mono, San Bernardino, Riverside, San Diego, Imperial, and Orange.

### **Staff Qualifications**

Get Safe employees are required to pass a background check and fingerprinting, as well as maintain current First-Aid/CPR certification. The collective background of Get Safe's professional staff includes state-certification as sexual assault crisis counselors, law enforcement, Bachelor and Master Degrees in social sciences, and completion of mandatory in-house training. All employees undergo Get Safe's extensive in-house and field training programs, continuing education in related fields and/or ongoing training in physical self-defense techniques. In addition to the on-going training required to meet job functionality and contractual specification, Get Safe continually evaluates the skills, performance, and growth of each staff member, to help ensure a clear pathway towards personal and professional goals within the scope of employment at Get Safe. Regular staff meetings encourage sharing of all relevant news, trends, and hands-on field experience, to help Get Safe and its employees speak with a single voice as to its service deliverables, operational philosophies, and commitment to providing the best service, individually and collectively.

### **Duty Statements: Program Staff**

The following are duty statements of proposed staff assigned to the program:

- Program Director. Provide direct oversight of the project. Responsible for the logistics associated with locating and securing training venues, promotion and coordinating meeting specifications, and scheduling training sessions. Organize and supervise the program in accordance with the established policies and objectives. Assess needs, make recommendations, and manage the implementation training services. Establish dialog with community agencies and resources, to fulfill project objectives and training outcomes. Maintain project-related records. Supervise assigned staff. Present internal quality assessment results to Senior Management at headquarters. Identify barriers in completing program objectives and submit documentation on actions taken to overcome such barriers to Senior Management. Minimum qualifications:
  1. A Bachelor Degree in communications development fields or human service disciplines.
  2. Two years of experience as a manager or supervisor of day-to-day program or office operations.
- Administrative Assistant. Working under the supervision of the Program Director, oversee and manage all project-related administrative tasks and documentation as assigned by the Program Director. Maintain master calendar/schedule of trainings, to minimize scheduling conflicts and overlaps. Create, modify, and maintain documents and materials such as training promotional and registration materials, formal correspondence, and training information programs and resource handouts. Monitor inventory training materials. Other duties as assigned by Program Director. Minimum Qualifications:
  1. Two years of experience in general office responsibilities and procedures.



2. Knowledge of basic principles and practices of basic office management and organization.
- Training Specialist. Present safety awareness, leadership skills, mentoring, education training information. Follow all policies and procedures established by Get Safe. Travel to designated training locations, as assigned by Program Director. Submit training reports on each training session, with details on attendance, issues encountered, and suggestions for improvement to Program Director. Minimum Qualifications:
1. Current First Aid/CPR Certification
  2. One year of experience in public speaking and/or presentation in instructional settings.
- Peer Educator. Travel with Get Safe staff to training sessions in order to provide a first-hand perspective of the challenges and concerns facing this population. Provide additional insight and feedback related to training content and supplemental materials. Minimum Qualifications:
1. Active member of the persons with disabilities community, in good standing
  2. Possesses confidence and ability to present to large audiences

**PREVIOUS GRANTS/AWARDS**

Get Safe has worked throughout California with a variety of local and state agencies and representatives and, therefore, believes it is uniquely qualified to assist in these networking and mentoring aspects.

<b>FY 2011-2012</b>			
<b>PROJECT</b>	<b>FUNDING SOURCE</b>	<b>CONTACT</b>	<b>AMOUNT</b>
<i>Get Safe's Safety Education &amp; Criminal Issues Training Series</i>	Area Board 9	Anastasia Bacigalupo (805) 648-0220	\$15,000.00
<i>Get Safe's Safety Education &amp; Criminal Issues Training Series</i>	Area Board 11	Susan Eastman (714) 558-4404	\$18,312.00
<i>Get Safe's Safety Education &amp; Criminal Issues Training Series</i>	Area Board 12	Vicki Smith (909) 890-1635	\$15,000.00
<i>Get Safe's Safety Education &amp; Criminal Issues Training Series</i>	Area Board 13	Mary Ellen Stives (619) 688-3323	\$21,480.00
<i>Get Safe's Regional Self-Advocacy Network Development</i>	Area Board 11	Susan Eastman (714) 558-4404	\$10,000.00
<i>Get Safe's Regional Self-Advocacy Network Development</i>	Area Board 12	Vicki Smith (909) 890-1635	\$10,000.00
<i>Get Safe's Self-Advocacy &amp; Community Supports Conference</i>	Area Board 12	Vicki Smith (909) 890-1635	\$11,068.00
<b>FY 2012-2013</b>			
<b>PROJECT</b>	<b>FUNDING SOURCE</b>	<b>CONTACT</b>	<b>AMOUNT</b>
<i>Get Safe's First Responder Training: Enhancing Your Ability to Effectively Respond to Persons with Developmental Disabilities</i>	Area Board 10	Roberta Newton (818) 543-4631	\$20,000.00
<i>Get Safe's Self-Advocacy Group Leadership Boot Camp: Leading Self, Leading Others</i>	Area Board 11	Susan Eastman (714) 558-4404	\$13,067.00
<i>Get Safe's Home Ownership for Persons with Developmental Disabilities, Made Easy Workshops</i>	Area Board 12	Vicki Smith (909) 890-1635	\$20,000.00



# Inyo-Mono Association for the Handicapped

*Moving Ahead - Reaching for the STARS*

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April 22<sup>nd</sup>, 2013

To Whom It May Concern:

On behalf of Inyo Mono Association for the Handicapped please accept this letter of reference and testimonial for Get Safe. Through recent collaborations, I have come to regard Get Safe as an expert agency with a unique ability to successfully transfer the message of safety, self-advocacy, and empowerment to persons with developmental disabilities. In addition, Get Safe instructs persons with disabilities in skills and techniques that helps them find their voice while advocating for themselves on relevant and meaningful issues that they encounter on a daily basis. Unlike any other agency I have previously encountered, Get Safe provides the consumer population with the tools necessary to promote self-advocacy, empowerment, and community involvement, encouraging them to be strong, independent, contributors to society.

I am appreciative of the work that Get Safe is doing, and the manner in which they are accomplishing it, and strongly support them in their future efforts to continue to bring these much-needed services to wider audiences.

Sincerely,

Adelina Rico  
Administrator  
760-873-8668

371 South Warren Street - Bishop, CA 93514  
Phone (760) 873-8668 Fax (760) 872-1377  
Email: [inyomonoah@earthlink.net](mailto:inyomonoah@earthlink.net)

IN SERVICE TO PEOPLE WITH DEVELOPMENTAL DISABILITIES



REGIONAL CENTER  
OF ORANGE COUNTY

April 14th, 2013

To Whom It May Concern:

The Regional Center of Orange County serves developmentally disabled adults through a variety of services and supportive programs. GET SAFE provides a variety of specialized services to a population that is often overlooked and underserved. They have assisted us by providing safety education, advocacy services, and violence prevention for our consumers. More importantly, GET SAFE not only teaches our consumers how to live safer, healthier lives, but also provides them with opportunities to experience personal growth and self-worth, changing the lives of so many of our clients.

Stuart Haskin, Executive Director, and his staff have shown an extremely professional, yet friendly and fun demeanor when working with our consumers. They understand that our consumers require innovative teaching styles and methods of interaction in order to truly grasp the material that is presented before them. They have a very unique way of inter-relating and communicating with all of our consumers, regardless of their functioning level or age.

GET SAFE also understands the importance of encouraging our consumers to be stronger leaders and self-advocates in their own lives. It is this message of empowerment, which is present in all of their work, that has impacted so many of our consumers to confidently become more independent and active members of their communities. GET SAFE has not only provided our consumers with the tools to enact positive change in their own lives, but also, and perhaps most importantly, they have created a mindset of self-determination in so many of our consumers, allowing them to believe they can achieve their dreams and live a more fulfilling life.

Indisputably, GET SAFE has become a leading force in the advocacy, inclusion, and integration for developmentally disabled consumers and we are proud to work with them.

Sincerely,

Jack Stanton  
Manager, Consumer and Community Resources  
Regional Center of Orange County  
714) 796-5308

---

**J. Craig Sullivan, J.D.**  
220 Newport Center Drive #11-295  
Newport Beach, California 92660  
Phone (949) 715-3108 FAX (949) 706-0765  
Email: [sullivanlavin@prodigy.net](mailto:sullivanlavin@prodigy.net)

April 28, 2013

To Whom It May Concern:

How can I find the words to properly recognize a group that has turned my son's life around? Because that's exactly what the Get Safe Agency has accomplished for our family.

I am the father of a 26 year old son who suffers from Autistic Spectrum Disorder.

For over a quarter of a century, the central focus of my personal life has been devoted to protecting my son from danger-- physically, mentally, and emotionally -- while helping him find his way in the world so that his life can have meaning and significance.

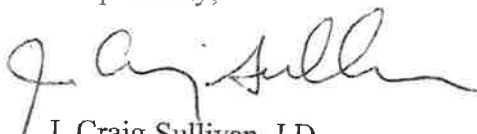
My son became involved with Get Safe less than a year ago. The result is nothing short of miraculous. His self-esteem and confidence has shot through the roof. He has been given the opportunity to make public presentations, organize self-help projects, participate in group endeavors for the betterment of his community, and most remarkably, recruit other developmentally disabled person into the group, so they in turn can become advocates too.

Perhaps the most extraordinary result of our son's involvement with Get Safe has been the dramatic turnaround in his self-image. By providing a safe environment for exploration of issues relating to one's disability, Get Safe has facilitated a process that permitted our son to become comfortable living in his own skin. This has allowed our son to recognize his "abilities" (not just his "disabilities"), freeing him from mental shackles so he has the confidence to contribute to others.

He is moving from being a consumer of services to being a provider of support to others in the community. Astounding!

Please accept these few words (I could write volumes) as my personal testimony on behalf of all the hard works of the Get Safe program. Whatever he asks, give it to him. Whatever he needs, provide it. No resources could be better invested than in the Get Safe agency. Because each dollar invested here will return one hundredfold dollars of productivity from developmentally disabled persons who will exceed all expectations.

Respectfully,



J. Craig Sullivan, J.D.

**Sean M. Sullivan**  
220 Newport Center Drive #11-295  
Newport Beach, California 92660

Email: [smsanime@hotmail.com](mailto:smsanime@hotmail.com)

April 26, 2013

To whom it may concern,

I, without a doubt, would be 110% lost and have 1 less support group that I truly think is the best support group for myself and many, many others without the Get-Safe program. I will also say that Get-Safe has had a HUGE positive impact on me in that they inspire and motivate me because they work very hard to help people who, without Get-Safe's help, would be traumatized in everyway possible. I, myself have found a way to voice myself through the help of this program. I strongly urge you to give them this grant, on behalf of myself and the many others I know who have benefitted from this program.

I am a Program Client/Developmental Disabilities Advocate.

*Sincerely/ Sean Sullivan*

**BUDGET COST WORKSHEET**

<b>PERSONNEL EXPENSES</b>			<b>2013-2014 Budget</b>
<b>A. Personnel Services</b>		<b>FTE</b>	
Program Director	\$86,400	47.5%	\$41,040
Lead Advocacy Training Specialist	57,600	65.0%	\$37,440
Training Specialist	58,000	13.0%	\$7,540
Administrative Staff Support	44,160	22.0%	\$9,715
<b>Sub-Total Personnel Services:</b>			<b>\$95,735</b>
<b>B. Benefits</b>			
Staff Benefits and Taxes (20% of all salary)			\$19,147
Consultant			\$2,400
<b>Sub-Total Benefits:</b>			<b>\$21,547</b>
<b>NON-PERSONNEL EXPENSES</b>			
<b>C. Travel Costs</b>			
Travel related to Contract			\$6,700
<b>Sub-Total Travel Costs:</b>			<b>\$6,700</b>
<b>D. Program Operation Expenses</b>			
Community Outreach			\$4,200
Instructional / Training Supplies			\$5,340
Video Production			\$4,900
Office Supplies and Postage			\$2,000
General and Professional Liability,			\$4,500
<b>Sub-Total Program Operation Expenses:</b>			<b>\$20,940</b>
<b>SUB-TOTAL PERSONNEL and NON-PERSONNEL EXPENSES:</b>			<b>\$144,922</b>
<b>OTHER</b>			
<b>E. Other</b>			
Administration Overhead (10% of total expenses)			\$14,492
<b>TOTAL CONTRACT EXPENSES:</b>			<b>\$159,414</b>

**LINE ITEM BUDGET NARRATIVE****A. Personnel Services -****Total: \$95,735.00**

**Program Director: (FTE 47.50%)** Provides direct oversight of the program and responsible for the logistics associated with program execution and completion. Travels to sites to oversee support services and training executions. Annual salary is \$45.00 per hour for 76 hours a month for 12 months of the contract, totaling \$41,040.00.

**Lead Advocacy Training Specialist: (FTE 65%)** Responsible for planning, building curriculum and supplemental materials, training executions, coordination with program staff and State Council staff, and community outreach. Travels to sites to provide support and training services. Annual salary is \$30.00 per hour for 104 hours a month for 12 months of the contract, totaling \$37,440.00.

**Training Specialist: (FTE 13%)** Assists in trainings, may roll over to lead trainer. Responsible for assistance with development and implementation of curriculum and supplemental materials. Annual salary is \$30.00 per hour for 21 hours a month for 12 months of the contract, totaling \$7,540.00.

**Office Staff Support: (FTE 22%)** Maintain master calendar/schedule of trainings, to minimize scheduling conflicts and overlaps. Create, modify, and maintain documents and materials. Annual salary is \$23.00 per hour for 35.20 hours a month for 12 months of the contract, totaling \$9,715.00.

**B. Benefits****Total: \$21,547.00**

**Staff Benefits and Taxes:** Paid for all salaries (20%):  $\$95,735.00 \times .20 = \$19,147.00$ .

**Consultant:** Offering guest presentations, connecting services, and information updates as needed.  $\$200.00 \times 12 \text{ months} = \$2,400.00$ .

**C. Travel Costs****Total: \$6,700.00**

**Travel Related to Contract:** Staff is expected to travel around the State to visit sites, attend meetings and trainings, meet with collaborating staff etc. Accommodations, travel time, transportation services for State meetings and training conducted throughout the state.

**D. Program Operation Expenses****Total: \$20,940.00**

**Community Outreach:** Development and production of marketing materials, including, but not limited to, mailers, handouts, marketing cards, in relation to outreach to facilities, work places, schools. Also included are costs associated with technological/virtual communication options (e.g., website management, FaceBook, Skype, etc.)  $\$350.00 \times 12 \text{ months} = \$4,200.00$ .



**Instructional/Training Supplies:** Development and production of self-advocacy reference materials, including but not limited to, booklets, brochures, organizational binders and notebooks, and supplemental tools.  $\$445.00 \times 12 \text{ months} = \$5,340$

**Video Production:** Camera operator, editing bay, graphics services, jewel case design and DVD production and copies.  $\$980.00 \times 5 \text{ months} = \$4,900.00$ .

**Office Supplies and Postage:** To create, print, and distribute supplies for administrative meetings, workshops, etc. Includes mailing, postage of flyers, program announcements, fiscal reports etc.,  $\$200.00 \times 10 \text{ months} = \$2,000.00$ .

**General and Professional Liability:** Coverage of \$2,000,000.00 for sexual abuse and liability insurance for all trainings, for duration of contract period of 12 months = \$4,500.00.

**E. Other**

**Total: \$14,494.00**

**Administration Overhead:** State rate on total expenses (10%):  $\$144,922.00 \times .10 = \$14,492.00$ .

**TOTAL: \$159,414.00**

**ATTACHMENT 1**  
**REQUIRED ATTACHMENT CHECKLIST**

A complete proposal or proposal package will consist of the items identified below. Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.

<b><u>Attachment</u></b>	<b><u>Attachment Name/Description</u></b>
<input checked="" type="checkbox"/> Attachment 1	Required Attachment Check List
<input checked="" type="checkbox"/> Attachment 2	Proposal/Proposer Certification Sheet
<input checked="" type="checkbox"/> Attachment 3	Cost Sheet
<input checked="" type="checkbox"/> Attachment 4	Proposer References
<input checked="" type="checkbox"/> Attachment 5	Payee Data Record (STD 204) The Payee Data Record can be found on the internet at: <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a> .
<input checked="" type="checkbox"/> Attachment 6	Contractor Certification Clauses (CCC). The CCC can be found on the Internet at <a href="http://www.ols.dgs.ca.gov/Standard+Language">www.ols.dgs.ca.gov/Standard+Language</a>

**ATTACHMENT 2**  
**PROPOSAL/PROPOSER CERTIFICATION SHEET**

This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package in duplicate with original signatures. The proposal must be transmitted in a sealed envelope in accordance with RFP instructions.

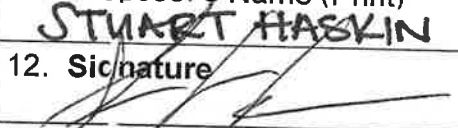
**Do not return Section C, Proposal Requirements and Information (pages 3 through 11) of this RFP.**

**For RFP Primary Only:**

- A. Our all-inclusive cost proposal is submitted in a sealed envelope marked "Cost Proposal - Do Not Open".
- B. Place all required attachments behind this certification sheet.
- C. The signature affixed hereon and dated certifies compliance with all the requirements of this proposal document. The signature below authorizes the verification of this certification.

**An Unsigned Proposal/Proposer Certification Sheet May Be Cause For Rejection**

**ATTACHMENT 2 (Cont.)**

1. Company Name <b>GET SAFE</b>		2. Telephone Number <b>(714) 834-0050</b>	2a. Fax Number <b>(714) 834-0070</b>
3. Address <b>17602 17TH STREET, SUITE 102 #259, TUSTIN, CA 92780</b>			
Indicate your organization type:			
4. <input type="checkbox"/> Sole Proprietorship		5. <input type="checkbox"/> Partnership	
6. <input type="checkbox"/> Corporation			
Indicate the applicable employee and/or corporation number:			
7. Federal Employee ID No. (FEIN) <b>33-0772477</b>		8. California Corporation No.	
9. Indicate applicable license and/or certification information:			
10. Proposer's Name (Print) <b>STUART HASKIN</b>		11. Title <b>EXECUTIVE DIRECTOR</b>	
12. Signature 		13. Date <b>04/26/2013</b>	
14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:			
a. California Small Business Enterprise		b. Disabled Veteran Business Enterprise	
Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
If yes, enter certification number:		If yes, enter your service code below:	
<b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is			
Date application was submitted to OSBCR, if an application is			

**ATTACHMENT 3**  
**COST PROPOSAL WORKSHEET**

BUDGET FOR: October 2013 – September 2014

<b>PERSONNEL EXPENSES</b>			<b>2013-2014 Budget</b>
<b>A. Personnel Services</b>		<b>FTE</b>	
Program Director	\$86,400	47.5%	\$41,040
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<b>Sub-Total Benefits:</b>			<b>\$21,547</b>
<b>NON-PERSONNEL EXPENSES</b>			
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Community Outreach			\$4,200
Instructional / Training Supplies			\$5,340
Video Production			\$4,900
Office Supplies and Postage			\$2,000
General and Professional Liability,			\$4,500
<b>Sub-Total Program Operation Expenses:</b>			<b>\$20,940</b>
<b>SUB-TOTAL PERSONNEL and NON-PERSONNEL EXPENSES:</b>			<b>\$144,922</b>
<b>OTHER</b>			
<b>E. Other</b>			
Administration Overhead (10% of total expenses)			\$14,492
<b>TOTAL CONTRACT EXPENSES:</b>			<b>\$159,414</b>

## ATTACHMENT 4

### PROPOSER REFERENCES

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal will cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

#### REFERENCE 1

Name of Firm REGIONAL CENTER OF ORANGE COUNTY  
Street Address 1525 N. TUSTIN AVE. City SANTA ANA State CA Zip Code  
Contact Person LARRY LANDAUER Telephone Number (714) 796-5255  
Dates of Service 2001 - ONGOING Value or Cost of Service \$450,000.00  
Brief Description of Service Provided

PERSONAL SAFETY, VIOLENCE PREVENTION, CONSUMER ADVOCACY TRAINING  
SERVICES IN BOTH GROUP & INDIVIDUALIZED FORMATS

#### REFERENCE 2

Name of Firm WESTSIDE REGIONAL CENTER  
Street Address 5101 GREEN VALLEY CIR. #328 City CULVER CITY State CA Zip Code  
Contact Person VICKI LUKE Telephone Number (310) 258-4086  
Dates of Service 2007 - ONGOING Value or Cost of Service \$30,000.00  
Brief Description of Service Provided

PERSONAL SAFETY, VIOLENCE PREVENTION, CONSUMER ADVOCACY  
TRAINING SERVICES IN BOTH GROUP & INDIVIDUALIZED FORMATS

#### REFERENCE 3

Name of Firm LANTERNAN REGIONAL CENTER  
Street Address 3803 WILSHIRE BLVD #700 City LOS ANGELES State CA Zip Code 90010  
Contact Person RONNA KAJIKAWA Telephone Number (213) 262-4976  
Dates of Service 2006 - ONGOING Value or Cost of Service \$40,000.00  
Brief Description of Service Provided

PERSONAL SAFETY & VIOLENCE PREVENTION TRAINING SERVICES  
IN GROUP SETTINGS/FORMATS

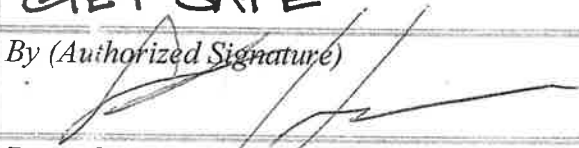
**PAYEE DATA RECORD**(Required when receiving payment from the State of California in lieu of IRS W-9)  
STD, 204 (Rev. 6-2003)

<b>1</b>	<b>INSTRUCTIONS:</b> Complete all information on this form. Sign, date, and return to the State agency (department/office) address shown at the bottom of this page. Prompt return of this <b>fully completed</b> form will prevent delays when processing payments. Information provided in this form will be used by State agencies to prepare Information Returns (1099). See reverse side for more information and Privacy Statement. <b>NOTE:</b> Governmental entities, federal, State, and local (including school districts), are not required to submit this form.			
<b>2</b>	<b>PAYEE'S LEGAL BUSINESS NAME</b> (Type or Print) GET SAFE CHOICE PERSONAL SAFETY, INC. <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <b>SOLE PROPRIETOR - ENTER NAME AS SHOWN ON SSN</b> (Last, First, M.I.)          GET SAFE       </div> <div style="width: 35%;"> <b>E-MAIL ADDRESS</b>          stuart@getsafeusa.com       </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <b>MAILING ADDRESS</b>          18122 Norwood Park Place  <b>CITY, STATE, ZIP CODE</b>          Tustin, CA 92780       </div> <div style="width: 48%;"> <b>BUSINESS ADDRESS</b>          17602 17th Street, Suite 102 #259  <b>CITY, STATE, ZIP CODE</b>          Tustin, CA 92780       </div> </div>			
<b>3</b>	<b>PAYEE ENTITY TYPE</b>  <b>CHECK ONE BOX ONLY</b>	<b>ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN):</b> 33 - 0772477 <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> <b>PARTNERSHIP</b>  <input type="checkbox"/> <b>ESTATE OR TRUST</b> </div> <div style="width: 45%;"> <b>CORPORATION:</b>  <input type="checkbox"/> <b>MEDICAL</b> (e.g., dentistry, psychotherapy, chiropractic, etc.)  <input type="checkbox"/> <b>LEGAL</b> (e.g., attorney services)  <input checked="" type="checkbox"/> <b>EXEMPT</b> (nonprofit)  <input type="checkbox"/> <b>ALL OTHERS</b> </div> </div> <hr/> <input type="checkbox"/> <b>INDIVIDUAL OR SOLE PROPRIETOR</b> <b>ENTER SOCIAL SECURITY NUMBER:</b> <span style="border: 1px solid black; padding: 0 5px;">  </span> <span style="border: 1px solid black; padding: 0 5px;">  </span> - <span style="border: 1px solid black; padding: 0 5px;">  </span> <span style="border: 1px solid black; padding: 0 5px;">  </span> <span style="border: 1px solid black; padding: 0 5px;">  </span> <span style="border: 1px solid black; padding: 0 5px;">  </span> <span style="border: 1px solid black; padding: 0 5px;">  </span> <span style="border: 1px solid black; padding: 0 5px;">  </span> <div style="text-align: right; font-size: small;">(SSN required by authority of California Revenue and Tax Code Section 18646)</div>		<b>NOTE:</b> Payment will not be processed without an accompanying taxpayer I.D. number.
<b>4</b>	<b>PAYEE RESIDENCY STATUS</b>	<input checked="" type="checkbox"/> California resident - Qualified to do business in California or maintains a permanent place of business in California. <input type="checkbox"/> California nonresident (see reverse side) - Payments to nonresidents for services may be subject to State income tax withholding. <div style="margin-left: 20px;"> <input type="checkbox"/> No services performed in California.  <input type="checkbox"/> Copy of Franchise Tax Board waiver of State withholding attached.         </div>		
<b>5</b>	<b>I hereby certify under penalty of perjury that the information provided on this document is true and correct.</b> <b>Should my residency status change, I will promptly notify the State agency below.</b>			
	<b>AUTHORIZED PAYEE REPRESENTATIVE'S NAME</b> (Type or Print) Stuart Haskin		<b>TITLE</b> Executive Director	
	<b>SIGNATURE</b>		<b>DATE</b> 04/26/2013	
			<b>TELEPHONE</b> (714) 834-0050	
<b>6</b>	<b>Please return completed form to:</b> <b>Department/Office:</b> State Council on Developmental Disabilities <b>Unit/Section:</b> Attention: Kristie Allensworth <b>Mailing Address:</b> 1507 21st Street, Suite 210 <b>City/State/Zip:</b> Sacramento, CA 95811 <b>Telephone:</b> (____) _____ <b>Fax:</b> (____) _____ <b>E-mail Address:</b> _____			

CCC-307

**CERTIFICATION**

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

Contractor/Bidder Firm Name (Printed) <b>GET SAFE</b>		Federal ID Number <b>33-0772477</b>
By (Authorized Signature) 		
Printed Name and Title of Person Signing <b>STUART HASKIN, EXECUTIVE DIRECTOR</b>		
Date Executed <b>04/26/2013</b>	Executed in the County of <b>ORANGE</b>	

**CONTRACTOR CERTIFICATION CLAUSES**

1. STATEMENT OF COMPLIANCE: Contractor has, unless exempted, complied with the nondiscrimination program requirements. (Gov. Code §12990 (a-f) and CCR, Title 2, Section 8103) (Not applicable to public entities.)

2. DRUG-FREE WORKPLACE REQUIREMENTS: Contractor will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

a. Publish a statement notifying employees that unlawful manufacture, distribution, dispersion, possession or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.

b. Establish a Drug-Free Awareness Program to inform employees about:

- 1) the dangers of drug abuse in the workplace;
- 2) the person's or organization's policy of maintaining a drug-free workplace;
- 3) any available counseling, rehabilitation and employee assistance programs; and,
- 4) penalties that may be imposed upon employees for drug abuse violations.

c. Every employee who works on the proposed Agreement will:

- 1) receive a copy of the company's drug-free workplace policy statement; and,
- 2) agree to abide by the terms of the company's statement as a condition of employment on the Agreement.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both and Contractor may be ineligible for award of any future State agreements if the department determines that any of the following has occurred: the Contractor has made false certification, or violated the







To State Council on Developmental Disabilities

Dear Ms. Roberta Newton:

This letter is to inform you that Supported Life Institute, a 501(c) 3 corporation wishes to participate as a responder in your Cycle 36 CPDG Self Advocacy Support RFP. Both our vision and mission of integrated, inclusive communities where every member has a voice and a hand in determining their own future are consistent with values, mission and vision articulated by the State Council on Developmental Disabilities. SLI practice and long experience of supporting local self advocacy groups as well as putting on statewide self-advocacy conferences for the last 18 years makes us uniquely qualified in taking on the task of supporting State Council's own efforts of creating and furthering Statewide Self Advocacy Network. We are already vested in SSAN as a vehicle to propagate and increase self advocacy among persons with intellectual disabilities throughout the state by helping elect local representative to the network and working closely with members of the network to increase self advocacy resources in the ten counties surrounding Sacramento.

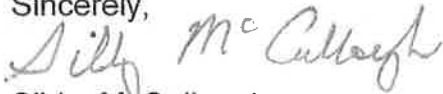
As an agency have a longstanding experience of partnering with a variety of local and statewide organizations to further the goals of inclusion, leadership, participation and self advocacy. We have successfully worked with local People First chapters, our own Area Board 3, Area Board 4, The Arc, ACRC and such local service providers as Choices, CIWP, Easter Seals and others.

We have also been successful in developing relationships with such national self-advocacy organizations as Autistic Self Advocacy Network. We were awarded Cycle 34 PDF grant to develop a local chapter of Autistic Self Advocacy Network, which we are happy to report is now a powerful self-advocacy resource for people on autism spectrum who wish to learn self-advocacy and leadership skills. Our ongoing work with micro-enterprisers in this area is a testament to our belief that economic opportunity for people with intellectual disabilities needs to improve drastically, otherwise all other gains in community integration and social acceptance may be hollow. That's why we would be excited to support Employment First Committee.

Through work with various client advisory committees we understand the importance of having the voice of self-advocates present at every level of our Disability Services Delivery System. It will be a privilege for us to support SAAC.

We have carefully read and understand all the provisions in this RFP and agree to be bound by them. We fully read and reviewed the terms and conditions as stated in the State Contracting Requirements, attached to the RFP and that by submitting a response understand that this document represents the agreement that we will be expected to execute if we are successfully awarded a Cycle 36 CPDG from the SCDD.

Sincerely,



Sibby McCullough

Board President

**Supported Life Institute responder application:**

**SCDD Cycle 36 CPDG: Self Advocacy Support**

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### **Statement of Purpose/Overall Approach**

With this grant, Supported Life Institute a (501) (c) 3 non-profit corporation (contractor) located in Sacramento, California will fund and support leadership coaching, training and self advocacy support of three entities that are currently working under the State Council on Developmental Disabilities organizational and state plan aegis: SSAN (Statewide Self Advocacy Network), SAAC (Self Advocacy Advisory Committee), EFC (Employment First Committee). Contractor will meet the needs and requirements of the mentioned entities to assure that they are able to accomplish goals and objectives outlined in the State 5 year plan. Specifically Goal # 1 which states: "Individuals with disabilities have the information, skills, opportunities and support to advocate for their rights and services and to achieve self-determination, independence, productivity, integration and inclusion in all facets of community life."

Objective 1a states: The council will promote the stability and expansion of a statewide self-advocacy network through financial and in-kind support, which includes ensuring that local delegates are able to participate effectively in statewide meetings and events.

Supported Life Institute itself gathers self-advocates from the ten counties surrounding Sacramento on a monthly basis similarly for the purpose stated in Goal # 1. It is our mission to promote greater inclusion, self-determination, independence, and economic integration of people with intellectual disabilities throughout our area in cooperation with Area Board 3. Working with State Council and SSAN, SAAC and EFC will give us an opportunity to provide support and leadership training to self advocacy leaders throughout the state.

Contractor understands that this is a one year grant, therefore time management and project planning and tracking are of the essence. To facilitate easy communication and follow through contractor will provide two management positions for this project. Senior position will be designated as Project Coordinator and will oversee the overall work flow and progress of the project as well as compliance with quarterly reporting and fiscal reporting requirements. Second position will report directly to the Project Coordinator and will be designated as Communications and Support Specialist to oversee the day to day operations and be available to all four entities for the duration of the grant. Both individuals will have joint office at the Supported Life Institute and will have regular contact and consultation. Project Coordinator will report directly to the SLI board of directors and will write all reports to SCDD on grant progress. Both individual have excellent knowledge of principals of self-advocacy, self determination as well as knowledge of the Disability Services Field and project planning, management experience as well as technical experience necessary to fulfill the technical and communications requirements of the grant. Since SLI has already identified both individuals to fill those positions, their resumes are attached.

Having worked extensively with client advisory committees, self advocacy groups and other entities contractor understands that its roll is supportive and consultative, always putting leadership and sound decision-making tools in the hands of self-advocates themselves. This being said, contractor will strive to provide appropriate, timely and accessible supports to client members of SSAN, SAAC, EFC and SCDD based on each individual members needs and expressed preferences.

## **Proposal Narrative**

### **Work Plan SSAN (Statewide Self Advocacy Network), SAAC (Self Advocacy Advisory Committee), EFC (Employment First Committee)**

#### **October 2013 (Start of the Grant)**

#### **SSAN**

- Set up a meeting with SSAN leadership and SCDD management to assess logistical needs for the next quarterly meeting.
- Help SSAN develop annual strategic plan.
- Help SSAN develop goals and objectives based on strategic plan
- Help SSAN develop measurable and achievable criteria for work progress.
- Contractor will meet with SSAN chair 3 times a month to work on agenda, task lists, assignments, reports etc. and to finalize logistical arrangements.
- Contractor will set up communication calendar to maintain ongoing contact with all members of the network and to help SSAN leadership monitor work flow.
- Help SSAN develop meeting materials and educational materials in alternative formats.
- Contractor will use facilitation questionnaire to gather basic information regarding SSAN members' adaptation needs. Develop a list of adaptations based on the assessment
- Use Time, Method and Materials analysis to develop appropriate adaptations to make meetings more inclusive.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

## **SAAC**

- Initial meeting with SAAC members to identify adaptation, support as well as organizational needs of the committee.
- Identify and utilize facilitation support to meet the needs of committee members.
- Preparing Council packet in alternative format for the November meeting
- Establish a regular schedule of meetings with the Chair to create agendas, alternative format documents, and establish ongoing organizational support.
- Establish remote communication calendar with other members via Adobe Connect etc.

## **November 2013**

### **SSAN**

- Develop quarterly review process for Strategic Plan goals.
- Start on creation of 4 SSAN presentations by helping leadership identify four topics for presentations
- Utilize Power Point or another presentation program to allow leadership to sketch out the presentation basics to be refined and expanded at the next SSAN quarterly meeting.
- Start setting up meeting logistics and create recommendations regarding locations, AV and accommodations to be forwarded to SCDD management.
- Contractor will develop project management tools to help track SSAN projects.
- Train SSAN leadership and membership how to use project management tools.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.



### **SAAC**

- Attend Nov. SAAC meeting
- Prepare SAAC member agenda, packets
- Prepare Council packet in alternative format for the use of the SAAC
- Meet with Chair in advance of the meeting.
- Utilize facilitation support to increase committee member participation
- **December 2013**

### **SSAN**

- Contractor will continue working with SSAN chair, preparing for the next quarterly meeting: agenda, work plans, communication calendar
- Gather necessary logistical information and forward it to the SCDD management regarding meeting place, AV and accommodations.
- Gather information from the membership regarding possible accommodation challenges.
- Start work on the SSAN brochure
- Start preparing technology training.
- Start preparing information for the quarterly report.
- Start gathering financial information to submit billing with quarterly report.
- Continue working on 4 presentations with SSAN chair.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

## **SAAC**

- Ongoing organizational support for SAAC chair, planning for January SAAC and Council Meeting

## **January 2014**

### **SSAN**

- Identify problems and work to identify solutions with meeting logistics, preparation, materials.
- Continue working on four presentations with cooperation of leadership.
- Continue working on the SSAN brochure.
- Update SSAN website
- Continue to assess technology needs and develop technology training for members of SSAN that will be responsive to their needs.
- Assess possible additional technology components to augment what is already in place: Adobe Connect, Flash cards etc. to increase communication between leadership and membership as well as giving membership tools to distribute SSAN information to local self-advocates and Area Boards.
- Continue planning for next quarterly meeting with SSAN chair and meet several times a week.
- Quarterly Review of the annual strategic plan (SSAN).
- Prepare quarterly report, financial billing and forward to SCDD at the end of the month.

- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Attend January SAAC meeting
- Prepare SAAC member agenda, packets
- Prepare Council packet in alternative format for the use of the SAAC
- Meet with Chair in advance of the meeting.
- Utilize facilitation support to increase committee member participation
- Complete quarterly grant progress report.

### **February 2014**

### **SSAN**

- Help SSAN understand SCDD legislative agenda and 5 year plan.
- Provide ongoing consultation regarding communication and provide support and technological training as needed.
- Continue working on the SSAN brochure.
- Continue developing 4 presentations
- Contractor will start identifying community, vendor outreach opportunities for the SSAN local members and leadership to publicize the network and give leadership and members' opportunities to practice doing the 4 presentations.
- Identify the potential "Train the Trainer" opportunities both locally and in other areas based on member feedback.

- Update the website with latest information from SSAN, from the quarterly meeting.
- Consult with SCDD management regarding video conversion of the two presentations.
- Do additional technology purchases as necessary.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Provide organizational and logistical support to SAAC Chair in preparation for March SAAC/SCDD meetings.

### **March 2014**

### **SSAN**

- If SCDD is interested in converting the videos, identify potential production contractors.
- Finish working on SSAN brochure and Identify candidates for SSAN brochure publisher.
- Continue regular meetings with Leadership of SSAN, preparing for next quarterly meetings, follow up on items and work from the previous quarterly meeting and tracking work assignments to membership, etc.
- Finish up at least two of the four presentations and continue work on the remaining two.

- Consult with SCDD management regarding 50 hours of technical support to local Area Boards, with view to greater technical expertise and development and support of local self-advocacy resources.
- Quarterly review of the annual strategic plan (SSAN).
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Attend March SAAC meeting
- Prepare SAAC member agenda, packets
- Prepare Council packet in alternative format for the use of the SAAC
- Meet with Chair in advance of the meeting.
- Utilize facilitation support to increase committee member participation
- Create adaptations for Legislative packet if directed by SAAC chair and any other materials or follow up.

### **April 2014**

### **SSAN**

- Assessment of ongoing projects and positive strategies to improve communication and work completion (leadership team and contractor)
- Finish process of selecting contractor to create videos, if directed to do so by the SCDD management.

- Finish process of identifying brochure publisher and finalizing the look and content of the brochure.
- Submitting Grant Progress Report and financials
- Finishing the last two presentations.
- Continue meeting with SSAN leadership/Chair to maintain organizational momentum and follow up on work assignments etc.
- Submitting grant proposal for Cycle 37 SA Support Grant
- Planning SSAN meeting materials, agendas etc.
- Providing 10hrs of support to local AB's per SCDD direction.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Provide organizational and logistical support to SAAC Chair in preparation for May SAAC/SCDD meetings.
- Follow regular schedule of meetings with Chair.
- Utilize facilitation support to increase committee member participation
- Complete quarterly grant progress report.

### **May 2014**

### **SSAN**

- Publish brochure
- Assistance and training to local AB's identified by SCDD 10 hrs.

- Continue meeting with leadership and providing ongoing support: quarterly meetings logistics, organization and materials.
- Start video production, through selected production contractor
- Do ongoing training and additional technology purchases as necessary.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Attend May SAAC meeting
- Utilize facilitation support to increase committee member participation
- Prepare SAAC member agenda, packets
- Prepare Council packet in alternative format for the use of the SAAC
- Meet with Chair in advance of the meeting.

### **June 2014**

### **SSAN**

- Prep with leadership for the quarterly meeting
- Review of the published brochure
- Projects in progress review
- Video draft review if available and finished
- Review Four Presentations and work with membership to identify possible presentation opportunities in their local areas.
- Practice presentation skills through Adobe Connect, etc.

- Schedule time at the quarterly meeting to review presentations and practice them.
- Assistance to local AB's identified by SCDD, 10hrs.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Provide organizational and logistical support to SAAC Chair in preparation for July SAAC/SCDD meetings.

### **July 2014**

### **SSAN**

- SSAN annual strategic plan quarterly review.
- Preparing Logistics, Agenda etc. for quarterly meeting
- Distributing SSAN brochures and presentations for use by members in their local areas.
- Review Video if finished and post it to SCDD website.
- Review of current projects, assessing progress so far, identifying areas that need extra attention to assure projects are finished by the end of the grant cycle.
- Assistance to local AB's identified by the SCDD: 10 hrs.
- Technology Training and support for members and leadership



- Third quarter grant report filed with financials by the end of the month
- Starting to write final report as well as assessing expenditures up till now and looking at final balances
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Attend July SAAC meeting
- Utilize facilitation support to increase committee member participation
- Prepare SAAC member agenda, packets
- Prepare Council packet in alternative format for the use of the SAAC
- Meet with Chair in advance of the meeting.
- Complete quarterly grant progress report.

### **August 2014**

### **SSAN**

- Prep for the final quarterly meeting of SSAN with Chair/leadership
- Assessment with leadership how to bring all the projects and deliverables to conclusion in time for the end of the grant cycle
- Continued work to practice presentations, identifying partners for “train the trainers” sessions.

- Assistance to AB's 10 hrs.
- Technology training and improving communication skills of SSAN membership and leadership
- Working on final grant report and 4<sup>th</sup> quarter report
- Updating SSAN website.
- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.

### **SAAC**

- Provide organizational and logistical support to SAAC Chair in preparation for September SAAC/SCDD meetings.

### **September 2014**

### **SSAN**

- Preparing for the quarterly meeting: final overview of logistics, accommodations and materials.
- Assistance to AB's 10 hrs.
- Review and plan ongoing presentations and "train the trainers" sessions
- Quarterly Review of the annual strategic plan.
- Communication and technology training
- All project wrap up and assessment with leadership of SSAN: identifying positive strategies to improve communication and project completion for next year.

- Utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities.
- Finish final quarter grant report
- Finish annual grant report.
- Submit all fiscal reports to grantor by the end of October.

### **SAAC**

- Attend September SAAC/SCDD meeting
- Utilize facilitation support to increase committee member participation
- Prepare SAAC member agenda, packets
- Prepare Council packet in alternative format for the use of the SAAC
- Meet with Chair in advance of the meeting.
- Complete quarterly and final grant progress report

**EFC**-Employment First Committee Meets four times a year, however meeting times and locations change, therefore contractor will provide more general timelines for the support of the committee.

**Fall**: 1. Identify self-advocate member needs. 2. Provide Appropriate Adaptations and materials. 3. Contractor will attend both Employment First Committee and Pre-committee self advocate meetings to adequately support and prepare self-advocates for the work of the committee. 4. Contractor will help and support self-advocacy limited 30hr. project initial stage. 5. Contractor will work closely with Self-Advocacy Specialist to create and adopt EFC materials for use by self advocates on the

committee. 6. Work SA Specialist and facilitators to meet the needs and goals of the self-advocates. 7. Write first quarter grant progress report.

**Winter:** 1. Provide Appropriate Adaptations and materials. 2. Contractor will attend both Employment First Committee and Pre-committee self advocate meetings to adequately support and prepare self-advocates for the work of the committee. 3. Contractor will help and support self-advocacy limited 30hr. project 2<sup>nd</sup> stage. 4. Contractor will work closely with Self-Advocacy Specialist to create and adopt EFC materials for use by self advocates on the committee. 5. Help with Legislative Packet, Legislative advocacy materials and adaptations if needed and directed by SA Specialist. 6. Work with SA Specialists and facilitators to meet the needs and goals of the self-advocates. 7. Submit first quarter grant progress report.

**Spring:** 1. Provide Appropriate Adaptations and materials. 2. Contractor will attend both Employment First Committee and Pre-committee self advocate meetings to adequately support and prepare self-advocates for the work of the committee. 3. Contractor will help and support self-advocacy limited 30hr. project 3<sup>rd</sup> stage, assess progress and facilitate completion by the end of the grant cycle. 4. Contractor will work closely with Self-Advocacy Specialist to create and adopt EFC materials for use by self advocates on the committee. 5. Work closely with SA Specialist and facilitators to meet the needs and goals of the self-advocates. 6. Write and submit second quarter grant progress report.

**Summer:** 1. Provide Appropriate Adaptations and materials. 2. Contractor will attend both Employment First Committee and Pre-committee self advocate meetings to adequately support and prepare self-advocates for the work of the committee. 3. Contractor will help and support self-advocacy limited 30hr. project 4th stage, assess progress and facilitate completion by the end of the grant cycle. 4. Contractor will work closely with Self-Advocacy Specialist to create and adopt EFC materials for use by self advocates on the committee. 5. Work closely with SA Specialist and EFC/SCDD staff as well as facilitators to meet the needs and goals of the self-advocates and the committee. 6. Write and submit third quarter grant progress report.

**Fall:** . Provide Appropriate Adaptations and materials. 2. Contractor will attend both Employment First Committee and Pre-committee self advocate meetings to adequately support and prepare self-advocates for the work of the committee. 3. Contractor will help and support self-advocacy limited 30hr. project; assess progress and facilitate completion by the end of the grant cycle. 4. Contractor will work closely with Self-Advocacy Specialist to create and adopt EFC materials for use by self advocates on the committee. 5. Work closely with SA Specialist and EFC/SCDD staff as well as facilitators to meet support needs and goals of the self-advocates. 6. Will write final grant progress report to be submitted by the end of October.

\*Contractor staff involved: Edward Plon (Program Coordinator), Jana Chapman Plon (Communications and Support Specialist), and Andy Faletti (Fiscal review and Budget)

\* One contractor staff will be present at all meetings of SSAN, SAAC or EFC

### **Proposal Narrative Goals, Objectives, Outcomes**

Contractor will provide the following services as prescribed by the RFP and meet all conditions and timelines required by Cycle 36 Self Advocacy Support Grant:

#### **Statewide Self-Advocacy Network (SSAN):**

##### **Leadership Coaching and Logistics**

Since Statewide Self Advocacy Network meets only 4 times a year, maintaining focus on projects, preparing meeting materials and agendas as well as communication between meetings are of paramount importance to the overall success of the committee and achieving deliverables. Accessible meeting space, audio and video capability and various accommodations are also extremely important in providing logistical support and workable environment for the members of the network.

**Goal1. Contractor will consult, assist and facilitate creation of meeting materials, securing facilities and provide appropriate accommodations for committee members to assure effective and productive meetings of SSAN.**

Objective 1: Contractor will assist Chair and VP in their meeting preparation, such as creating agendas, task lists, assignments, position documents, progress reports etc.

- a. Contractor Staff will meet with Chair and VP several times a month, either in person or via phone, internet etc. (by utilizing Adobe Connect, Skype etc.) to help Chair and VP develop meeting agendas, keep track of project progress, and assure that both Chair and VP are in contact with the rest of the network members.
  - a. Contractor will provide SSAN members and support with ongoing training in use of Adobe Connect or other communication technologies.
- b. Contractor Staff will work with Chair, VP as well as the rest of the members and facilitators developing community contacts and outreach opportunities in the network areas. (Once a month)
- c. Contractor Staff assist Chair and VP developing a list of community partners and contacts to bring SSAN message to local organizations, vendors etc.
- d. Contractor will assist Chair and VP in developing project management timelines and tools to track progress of ongoing network projects and

to assure that there is adequate preparation before each meeting.

(start 10/1/2013)

- e. Contractor will assist Chair and VP in understanding issues and legislative advocacy agenda of SCDD and help bring that agenda into the work of SSAN.

Objective 2: Contractor will assure that appropriate alternative format documents and materials are available when needed by committee members.

- a. Contractor will identify alternative format needs of the SSAN members through interview questionnaire and input from current facilitators.
  - a. Contractor will use Facilitation Questionnaire to gather basic information.
- b. Contractor will develop Time, Method, Material analysis with input from SSAN members and their support staff to identify necessary adaptations and facilitation needs.
- c. Contractor will facilitate production of Alternative Format materials that will respond to network member needs.
- d. Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the network.

Objective 3: Contractor will secure facilities and accommodations with proper approval and in consultation with SSAN and SCDD management.



- a. Contractor will research possible sites for the network meetings as needed and per network and SCDD management guidelines.
- b. Contractor will rely on network and SCDD management final decision to lease both meeting space and purchase or lease of any equipment or adaptation devices since SCDD is the source of funding for the entirety etc.
- c. Contractor will be guided by state regulations regarding allowable expenditures, purchases and leases.
- d. Contractor will assure that all facilities are accessible to the network members and visitors.

Outcome: 1 SSAN meetings will have all administrative and logistical support to run smoothly and efficiently throughout the year.

- 2. Organizational issues will be resolved in a timely manner and problems identified well in advance of the meetings so they do not impede the work of the network.
- 3. Organizational and administrative work will be carried out continuously throughout the cycle of the grant thus maintaining communication and smooth functioning of the supports needed by the leadership and membership of the network.
- 4. Due to ongoing organizational work, deadlines and work items will be more easily met, reducing stress on network leadership, membership and facilitators.
- 5. SSAN leadership and membership develop skills to prepare, structure and run meetings more independently.

**Goal 2: Contractor will assist SSAN leadership and membership in developing an annual strategic plan as a framework for 2013-2014 activity of the network and help SSAN track progress fulfilling strategic plan goals and objectives.**

Objective 1: Contractor will help SSAN leadership and membership develop a process for creation of annual strategic plan.

- a. Contractor will facilitate group process bringing into focus context and purpose for SSAN work
    - i. SCDD Strategic Plan-5 year Strategic Vision
    - ii. SSAN Mission and Vision.
    - iii. Current needs of the local area board constituency
    - iv. Vision of SSAN as an independent statewide self advocacy organization
    - v. Building upon what has already been achieved so far.
- (10/1 to 11/15 2013 Contractor Staff, Facilitators)

Objective 2: Contractor will facilitate writing goals and objectives as well as work plans for the SSAN annual strategic plan within defined purpose of the network.

- b. Contractor will facilitate group process to identify achievable, measureable annual goals and objectives that fulfill mission and vision of SSAN. (10-1 to 12-15 of 2013) Contractor Staff and Facilitators

Objective 3: Contractor will help leadership and members use task and assignment tools to delegate and assign portions of work to members of the network with clearly defined deadlines and expectations.

- a. Contractor will help network leadership develop tools to track performance and completion of all work assignments. (11/15 forward, Contractor Staff and Facilitators)
- b. Contractor will help leadership develop a communication calendar to track work assignments through regular communication with membership. (10/1 ongoing) Contractor Staff and Facilitators.

Objective 4: Facilitate quarterly review of the annual Strategic Plan.

- a. Contractor will help SSAN leadership develop reasonable and measurable criteria to measure progress.
- b. Contractor will facilitate communication and help leadership develop communication calendar with membership in order to track and review task and work completion.
- c. Contractor will assist network leadership identify issues, problems and obstacles that impede work progress and help identify solutions that facilitate positive outcomes.
- d. Contractor will help create tools to track progress and task, work completion.

- e. Contractor will assure that quarterly review is an open and transparent process involving the network members and leadership and is part of SSAN quarterly meeting agenda.

Objective 5: Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the network.

Outcome: 1. Work identified in the annual strategic plan gets done in a timely manner with concrete deliverables at the end of the grant cycle.

2. SSAN leadership and membership learn how to develop annual strategic plan furthering SSAN organizational competency and increasing independence.

3. SSAN leadership and membership learn how to translate annual strategic plan into goals and objectives, work items and measurable outcomes.

4. SSAN leadership learns to delegate work, track and assess progress.

5. SSAN leadership and membership learn to identify issues and problems and how to resolve them in a timely manner.

**Goal 3: Contractor will develop 4 trainings this coming year based on input from SSAN leadership and topics suggested by the membership.**

Objective 1: Contractor will help membership develop a list of presentation topics based on current annual strategic plan and responsive to the needs

of SCDD, community partners, and overall goal of promoting self-advocacy throughout the state.

Objective 2: Contractor will help leadership create 4 presentations based on suggested topics that will utilize Power Point or other presentation formats determined by the network.

- i. Contractor will facilitate creation of presentations that will have the following characteristics:
  - 1. Clear and Accessible to widest range of people
  - 2. Including alternative formats such as Simple Language, Icons, Text to Speech and other accommodations.
  - 3. Incorporate useful and needed information that promotes self-determination and self-advocacy.
  - 4. Responds to the needs of the DD community.
  - 5. Consistent with SCDD and SSAN purpose, goals and objectives.
  - 6. Easily disseminated through print and electronic media.

7. Accommodates various presentation and learning styles of SSAN members.
8. Easily learned and trained by other trainers under "Train the Trainers" model.
9. Teaches and accommodates increasing speaking, presentation competency.

Objective 3: Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the network.

Outcome: 1. SSAN becomes an important state-wide educational resource that empowers self advocates and self advocacy leaders with readily available training materials.

2. SSAN creates a statewide "Train the Trainer" network that disseminates SCDD self advocacy materials and information and attracts and supports new crop of leaders and self-advocates.

3. SSAN members learn, practice and improve speaking, presentation and advocacy skills and become visible models for other self-advocates statewide.

Video formats have become a very useful and popular way to disseminate important information as attested by growth of various materials related to advocacy, DD services

etc. on such sights as YouTube, etc. Video has wider and more varied audience than text and can reach a lot of people with intellectual disabilities that could not be reached otherwise. To accommodate this reality, contractor will seek assistance from an experienced video production company or such vendors as DDSO E+ productions who employ people with developmental disabilities in video productions to create two videos specified by the grant and if requested by the SCDD

**Goal 4 If requested by SCDD, contractor in consultation with SCDD will identify a video production company that will competently convert two network presentations to 15 minute videos that will represent SSAN presentation content and will meet production standards of The State Council on Developmental Disabilities. Both videos will be posted to SCDD website.**

Objective 1: Contractor will help SSAN leadership identify presentations to be converted to video.

Objective 2: Contractor, in consultation with SSAN and SCDD will interview and identify potential production companies for the two videos.

- a. Potential video contractors will be interviewed based on their past work and ability to delivery finished product on time.
- b. Potential contractors will have to demonstrate experience working with people with intellectual disabilities.
- c. Employment of people with developmental disabilities in video and production will be considered in selecting the final choice.

- d. Quality of past work and finished product will also be evaluated.
- e. Ability to finish project within budgeted cost.

Objective 3 Contractor will set up a process to allow SCDD management SSAN members and leadership to be part of the selection process if requested.

- i. Contractor will strive for the selection process to be:
  - a. Fair, Open and Transparent
  - b. Responsive to the needs of SCDD

Objective 4 Contractor will develop a budget for the video production that complies with grant requirements or use budgeted amount if already determined by SCDD.

Objective 5 Contractor will provide project updates and previews when available to SCDD as well as SSAN regarding progress and final product.

Objective 6 Contractor will assure that videos are finished and posted to SCDD website by the end of this grant cycle.

Objective 7 Contractor will develop plain language learning guide to be available with the videos and also published on the website.

Outcome: SCDD and SSAN will have video materials that will reach out to people with intellectual disabilities who may not be within immediate reach of the network.

**Goal 5 Contractor will use or have alternative formats available for all SSAN materials and will create SSAN general distribution brochure that will also utilize alternative formats to reach the widest audience statewide.**



Objective 1 Contractor will identify important information to be included in the brochure

Objective 2 Contractor will involve SSAN leadership and membership in the design of the brochure and the approval of finished version to be printed.

Objective 3 Contractor will identify a local publisher/printer such as Warren McClaskey Adult Center who employ people with intellectual disabilities and have a track record of publishing materials for vendors and state projects that meet both quality and cost requirements.

Objective 4 Contractor will develop a budget for publishing the brochure that will comply with grant requirements or use the budget amount already determined by the SCDD for this item.

Objective 5 Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the network.

Objective 6 Contractor will utilize and augment any Alternative Communication formats already used by the network that have proven to be effective and useful.

Outcome: Network materials will reach variety of populations and will be available to self-advocates with a variety of communication needs.

**Goal 6 Contractor will increase competency of SSAN members and leadership in the use of various technological systems, such as VOIP, Adobe Connect, Skype etc. as well as the use of various other technological means such as flash drives,**

**webinars etc. to increase communication, efficiency and performance of SSAN and its leadership.**

Objective 1 Contractor will assess technological/communication needs and abilities of the SSAN leadership and members.

- a. Contractor will identify individual needs of network members through individual interviews and conversation with facilitators.
- b. Contractor will develop training plan for individual members.

Objective 2 Contractor will build on what has already been done in training and utilizing technology to facilitate work of the network.

- a. Contractor will continue using Adobe Connect, flash drives and other technological tools if found to be effective by the network members and leadership of the SSAN.
- b. Contractor will assess improvements and augmentation of current technological tools.
- c. Contractor will assess and introduce new tools as needed to complement existing tools and to meet the needs of the network.

Objective 3 Contractor will do regular technological training during SSAN quarterly meetings and work with member facilitators to implement personalized training throughout the year to respond to individual needs and deficits.

- a. Contractor will build on individual needs of the members based on the assessment and facilitator input.
- b. Contractor will implement year long technological training both at the quarterly meetings and more specific, need based training through local facilitators.

Objective 4 Contractor will explore and introduce additional technological components to continue growing and improving communication, outreach, accountability and productivity of the network.

- a. Contractor will consult with SSAN, identify unmet needs that could be met by introduction of additional technological components.
- b. Contractor will introduce new technological components based on
  - i. Flexibility, user-friendliness and compatibility with technological components that work now.
  - ii. Ability to augment network's ability to expand its outreach and communication.

Objective 5 Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the network including mastering technological tools.

Outcome: 1. Greater competence on the part of the members and leadership of the network in using technology to improve communication and reduce cost.

2. Quicker and more efficient dissemination of information to regions throughout California.

- a. Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the network.

**Goal 7 Contractor will make SSAN materials accessible to wider audience by maintaining SSAN website.**

Objective 1 Contractor will keep SSAN website updated regularly with latest materials from the meetings as well as educational and training presentations.

Outcome: SSAN website becomes another effective outlet for the network activity and outreach.

**Goal 8 Contractor will provide 50 hours of technical support to local area boards at the discretion of SCDD.**

Objective 1 Contractor will develop training curriculum to be used for technical training of Area Board staff addressing the following topics: outreach, establishing and maintaining self-advocacy groups, presentation modalities and technology.

Outcome: Ongoing support will assist all area boards to disseminate self-advocacy and SSAN related materials better and quicker, thus optimizing the overall effectiveness of the network.

**Goal 9: Contractor will attend all SSAN meetings.**

**SAAC Goals and Objectives**

**SAAC is a client advisory committee to State Council on Developmental Disabilities. SAAC meets one day prior to SCDD board meetings. As an important source of information for the Council it is vital for members of SAAC to be prepared for Council meetings and to understand issues before them. It is the responsibility of the contractor to assist SAAC chair and members in getting ready for the council meeting by providing appropriately prepared materials, information and support.**

**Goal 1. Contractor will work with committee chair to facilitate and assist in creation of SAAC agendas, council report, meeting plans and any required follow up for SAAC meetings incorporating alternative formats as requested by the Chair.**

Objective 1 Contractor will establish regular schedule of meetings with SAAC Chair to make sure all materials and support are ready in advance of the meeting.

Objective 2 Contractor will prepare and have available on request all SAAC materials in Alternative Formats prior to the SAAC meetings.

- a. Objective 3 Contractor will prepare Council packet and SAAC materials in Plain Language when directed to do so by the Chair. Contractor will utilize facilitator help and support whenever possible to assist network members to fulfill their duties and responsibilities and to participate fully in the work of the committee and SCDD.

Outcome: Members of SAAC will be prepared and well informed and will be able to participate fully in the work of the State Council.

Outcome 2: Work of the committee will be more focused, organized and meeting the needs of the Council.

**Goal 2 Contractor will attend all meetings of SAAC.**

**Goals: Employment First Committee**

**Goal 1 Contractor will support self advocates sitting on EFC by providing plain language materials to help them better understand issues discussed in this committee and the Council.**

Objective 1: Contractor will provide self-advocates sitting on the committee with Plain Language versions of the committee and Council materials to facilitate better understanding of the issues related to employment of people with intellectual disabilities.

Objective 2: Contractor will convert EFC packet and other materials into Plain Language Format at the request of committee chair or Self Advocacy Specialist.

Objective 3: Contractor will utilize facilitator help and support whenever possible to assist committee members to fulfill their duties and responsibilities and to participate fully in the work of the EFC.

Outcome: Increased participation and informed decisions regarding employment issues by self-advocates sitting on the committee.

**Goal 2 Contractor will assist EFC self-advocates creating a time-limited project of no more than 30 hours and approved by SCDD.**

Objective: Contractor will assist self advocates determine the nature of the project and timeline for completion; contractor will also help self-advocates develop work plans for the project.

Objective: Contractor will assist self-advocates with development of project management tools and help project progress.

Objective: Contractor will assist self-advocates with all needed project reports, materials etc.

Outcome: 1. Employment-related project completed by the end of the grant.

Outcome: 2. Self-Advocates learn how to manage a small project and deliver it on time.

**Agencies and Organizations as potential partners for this grant:**

**Disability Rights California-** Currently working on competitive employment agenda. Because it is a statewide organization, can work with EFC self advocates statewide in promoting competitive employment options.

**ARC-**With chapters throughout the state and focus on better services and promoting self-advocacy, ARC would be a natural partner for SSAN to create venues for “train the trainer” events.

**ILC’s Youth Organizing (YO Disabled and Proud)** can be a great partner to reach younger, active population who are just starting on their path to self advocacy (SSAN, EFC)

**Progressive Employment** (Sacramento and Crescent City): A wonderful local vendor that specializes in competitive employment and micro-enterprises. No subminimum wage or workshop placements here. This agency could be a great partner for EFC and a showcase, of what employment could look like and should look like for people with intellectual disabilities.

**State Legislature-**developing contact with local legislator can be the most important thing we can do to advance agenda of SCDD. Educating our local legislators and staff by inviting them to SSAN, SAAC and EFC meeting can be transformative for them and us.

**DDSO E+** productions for video projects

**Main-Sail Services** from Chico, similar: video projects and possible other visual media.



**Easter Seals and UCP in Sacramento** have been very receptive to self-advocacy presentations and interested in starting CAC, Self-Advocacy Groups. (SSAN train the trainer presentations)

**Choices Transitional Services** a very supportive vendor, promoting self-advocacy and support groups in South Lake Tahoe and elsewhere.

**ASAN**-Autistic Self Advocacy Network: National and throughout California: Sacramento, San Francisco, San Jose, Los Angeles. Good partner to SSAN and not often mentioned in conversations about self advocacy.

### **Outcome Evaluation Plan**

Contractor will create an outcome evaluation grid to be used in tracking performance. Desired outcomes have been outlined in the Goals and Objectives. Quarterly review of SSAN Annual Strategic Plan will also be integrated into the evaluation grid. There are concrete deliverables that will need to be achieved by the end of the grant cycle: SSAN brochure, four presentations, and possible video of two presentations, 30 hour EFC project and 50 hours of support for Area Boards, train the trainer sessions. Some outcomes will be difficult to track, such as increased participation, knowledge, presentation skills and decision-making on the part of self advocates who are in SAAC, SSAN and EFC. Close cooperation with facilitators may yield good information regarding progress in those areas. Contractor may do benchmarking and interviews to track progress in those, less quantifiable areas. All outcomes that meet goals and objectives and fulfill SCDD mission and vision will be considered positive outcome of work under the grant.

Since grant has specific parameters with respect to duration and budget, all outcomes will have to be achieved within those boundaries.

**Contractor Qualifications:**

Supported Life Institute, Peer Advocacy Connection is currently in its 12<sup>th</sup> year of existence. The Mission and Vision of Supported Life Institute is the full inclusion of people with various intellectual disabilities into the fabric of our society. Over the last 12 years we have endeavored to provide people with developmental disabilities with opportunities to learn, practice and teach their peers self-advocacy skills. We have consistently promoted the value of citizenship and participation of every individual in the American experience starting with expression of personal ideas, values and choices.

Our central mission is promoting self and peer advocacy among people with intellectual disabilities based on grass roots community organization model. As a local agency we have a great track record of supporting self-advocacy groups in our region and providing growth and leadership training opportunities for both officers and members. We are currently supporting 12 self advocacy groups in the ten counties around Sacramento. We are also working with self-advocates statewide through our Self Advocacy Conference, which attracts self advocates and leaders for educational and training opportunities from around the state. For the last two years we have had great cooperation with Statewide Self Advocacy Network and have had presentations by Austin Taylor at our Regional Meetings and Peer Advocacy Connection. We also have had the privilege of being represented at the

Statewide Self Advocacy Network by AB3 and Austin Taylor. Needless to say both Austin and Jennifer Allen are well known in our region and we worked with both of them over the years as leaders of self-advocacy in our area. It will be a wonderful opportunity for SLI and our staff to work with Austin and Jennifer once again to further goal of self advocacy statewide.

**Experience Strategic Planning**-Edward Plon: participated in SLI strategic planning retreats last year. Participated (as board member facilitator) in ACRC strategic planning retreats and trainings since 2004. Also helped self-advocates navigate strategic retreats and planning sessions in 2006 and 2007.

**Experience with Train the Trainer Model:**

- **Leadership Seminars put on Peer Advocacy Connection use this model extensively.** Each year officers of one chapter identify a topic and create a presentation with help from SA coordinator. They present to officers of other chapters, who in turn take the presentation to their chapters and teach membership the concepts they had learned.
- Our regional meeting also relies on this model to disseminate information about emergency preparedness, local advocacy etc.

**Proven History of instructing novice users in technology and social media for purposes of communication.**

- Peer Advocacy Connection has been at the forefront of using social media and technology to bridge distances of our ten counties between our chapters and self-advocates. Most of our self-advocacy chapters are very social media savvy. With our assistance they have set up pages on Facebook, Meet-up and other social sites. Galt People First, South Area People First, Capitol People First, Marysville People First and Yuba Sutter People First have Facebook pages where they post news of the chapter events, publicize meeting dates, fundraisers etc. These chapters administer these pages independently as they learned the skills of how to add friends, create new events etc. ASAN Sacramento used meetup.com to publicize events, advertise protests etc. They are also present on Facebook. Our experience at SLI is that given proper training novices quickly become experienced hands as long as technological tools are useful and reinforcing to use.
- **Thorough knowledge of Open Meeting Laws-**We are versant with meeting rules and understand issues of privacy vs. public access and right to know.

**Letters of Support**

April 29, 2013

Loie Rhodes, Program Manager  
Discovering Options Adult Day Program and  
Twin Rivers Adult Growth Experience II

Aero Haven Adult School, 5450 Georgia Drive  
North Highlands, CA 95661  
Phone: 916-390-2853 Fax: 916-331-2316

Re: Supported Life Institute Self-Advocacy Grant  
for State Council Cycle 36 Grants

Grant Committee Members:

It is my great pleasure to recommend and commend the work the Supported Life Institute accomplishes with regard to training and supporting individuals to advocate for themselves. For the last year Ed Plon, from Supported Life Institute Peer Advocacy Connection, dedicated a significant amount of time to work collaboratively with United Cerebral Palsy (UCP) of Sacramento and Northern California to ensure success in providing insightful training for our clients and staff.

In addition to learning how to project a positive and healthy self image, our clients were extremely interested and dedicated to being a part of their community and demonstrating that they have a voice and ideas that can benefit the community and its members. The development of a curriculum integrating our individuals as a part of a healthy community greatly benefitted from the additional collaboration and expertise of the Clients' Rights Advocate of Alta California Regional Center.

Was this collaborative endeavor a success? Did our clients feel empowered?

As training was delivered, the resulting enthusiasm and positive force was greater than we had first predicted. Repeatedly, the team met, planned, and was guided by the expertise of Supported Life Institute. As individuals "found their voices," they spoke with dignity and value and the entire day program community benefitted as each individual moved to a position of positive strength. As a direct result of the efforts of the Supported Life Institute Self-Advocacy training, we were excited to see individuals provide nurturing assistance to one another and to demonstrate how to proceed with confidence and purpose as they made their personal choices.

The ongoing collaboration and work of the Supported Life Institute with UCP, for and by our clients and staff, will continue to have a positive ripple effect on the Sacramento community. Clients who previously never considered participating in a peer advocacy group have prepared personal life stories, recounted their successes, and offered to support others to do the same with continuing ongoing trainings and meetings.

If you need any further information regarding my experiences with Supported Life Institute support of self-advocacy, please feel free to contact me.

Sincerely,



Loie Rhodes

**4350 Auburn Blvd  
Sacramento, CA 95841**

**Tel (916) 565-7700  
Fax (916) 565-7773**

**www.ucpsacto.org  
ucp@ucpsacto.org**

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**President/CEO**  
Doug Bergman

**Tax ID 94-1507998**





April 30, 2013

State Council on Developmental Disabilities  
1507 21st Street, Suite 210  
Sacramento, CA 95811

To Whom it May Concern,

I have had the pleasure of being involved with the Supported Life Institute in a variety of capacities for over 15 years. My initially involvement with SLI was through my attendance at their conferences. I remember being impressed each year by both the quality of the conference content as well as the quality of overall organization. The other thing that struck me in those early years was the level of self advocate involvement in the conferences. Over the years my participation with the SLI has increased, finding their mission and purpose in line with my own beliefs, I have served on conference planning committees and subsequently their Board of Directors until last year.

The Support Life Institute embodies all that is forward and progressive in this field. From their beginnings as a training institute to the inclusion of self advocacy training and support to their addition of communication support, they are truly a positive force in promoting communities where everyone belongs. While I strongly support all of the programs of the Supported Life Institute one area I feel they truly excel in is their self advocacy training and support. Self advocacy is such a critical component in supporting people with developmental disabilities to successfully direct their own lives. Yet there are very few organizations that have the expertise to support people in an authentic way to take this lead. The Supported Life Institute has a proven track record of successful self advocacy training and support. They excel in this area I am excited to see what they can do given additional resources to expand and improve on an already successful model.

I whole-heartedly back the Supported Life's application for grant funding in the area of self advocacy. I am confident that the grant will be put to exceptional use and the benefits will be felt by all in our community.

Respectfully,

Carole Watilo  
Executive Director  
Progressive Employment Concepts



**Peter Van Deventer**, Chairman  
**Gary T. Kasai**, President and CEO  
**William M. Green**, MD FACEP

## Easter Seals

### Superior California Corporate Office

3205 Hurley Way  
Sacramento, California 95864-3898  
(916) 485-6711 Phone  
(916) 485-2653 Fax  
[www.myeasterseals.org](http://www.myeasterseals.org)

1670 Sierra Ave. Ste. 601  
Yuba City, CA 95993  
April 30, 2013

Calif. State Council on Developmental Disabilities  
1507 21<sup>st</sup> St. Ste. 210  
Sacramento, CA 95811

Dear Ms. Roberta Newton,

On behalf of Easter Seals Superior, I would like to offer our endorsement of Supported Life Institute as a resource to advocates in the Marysville and Yuba City area. They have supported us with our self-advocacy groups and have welcomed these groups to the Peer Advocacy Connection, providing them with trainings, materials and resources to take back to their peers in their community. They worked with Area Board 3 to facilitate trainings on topics like health journaling and legislative advocacy at the Self-Advocacy Regional Meetings and these meetings have been a great way for us to connect with other advocacy groups and get training.

Easter Seals is dedicated to empowering people with disabilities by offering a wide range of services and leadership opportunities designed to encourage maximum independence. Supported Life Institute has helped us with this mission and we endorse them a strong self-advocacy champion in their bid to be awarded State Council on Developmental Disabilities Cycle 36 CPDG Self Advocacy Support Grant.

Sincerely,

Amy Fulk  
Site Manager  
Easter Seals ACE IT-III  
530-673-4585





## **WarmLine Family Resource Center**

2025 Hurley Way #100, Sacramento, CA 95825

916-922-9276/800-660-7995 Fax: 916-922-9341

[www.warmlinefrc.org](http://www.warmlinefrc.org) / email: [warmline@warmlinefrc.org](mailto:warmline@warmlinefrc.org)

Ms. Roberta Newton  
Calif. State Council on Developmental Disabilities  
1507 – 21st St., Ste 210  
Sacramento, CA 95811

Dear Ms. Roberta Newton,

The WarmLine Family Resource Center would like to offer our endorsement of Supported Life Institute as a local resource for self-advocacy for our families and youth. Over the years we have developed a close cooperation with Supported Life Institute and its three main projects: Self Advocacy Conference/Supported Life Conference, Peer Advocacy Connection and C-Tech. As we have participated and worked with these projects, we have found that each one serves the cause of self advocacy and self-determination in a different way that compliments and enhances what we do here at our agency.

The WarmLine Family Resource Center's mission is to provide information, education and support to promote and strengthen the foundation of families and children with special needs so they can face the challenges of the present and create new dreams for the future. Since 1993 we have provided this support to families in six counties (Sacramento, Placer, Yolo, Nevada, EL Dorado and Alpine).

When we are working with C-Tech, our families and youth learn about alternative and augmentative communication. As SLI partner during two Assistive Technology Expos we were able to offer our families the latest information about communication options that are rapidly expanding as various devices and programs are becoming more widely available. Offering new options in communication to our clients is one of the most promising things we can do to set them on a better path. C-Tech is at the forefront of providing means for people to be heard, who may not have been in that position before. Their staff are always knowledgeable, respectful and cognizant of the latest developments in AAC.

When we worked with Supported Life Conference team on a transition strand, we were able to once again offer valuable resources and information to our families who have so many questions about what is next for their son or daughter after graduation? Transition is such an important topic as the future for young people graduating special ed. programs is so much brighter today, but also so much more complicated. As employment becomes the central issue in any personal futures planning. Once again, Supported Life Institute brought experience, expertise and professionalism to planning and realizing our agency goal of bringing this information to more families and youth in our area.

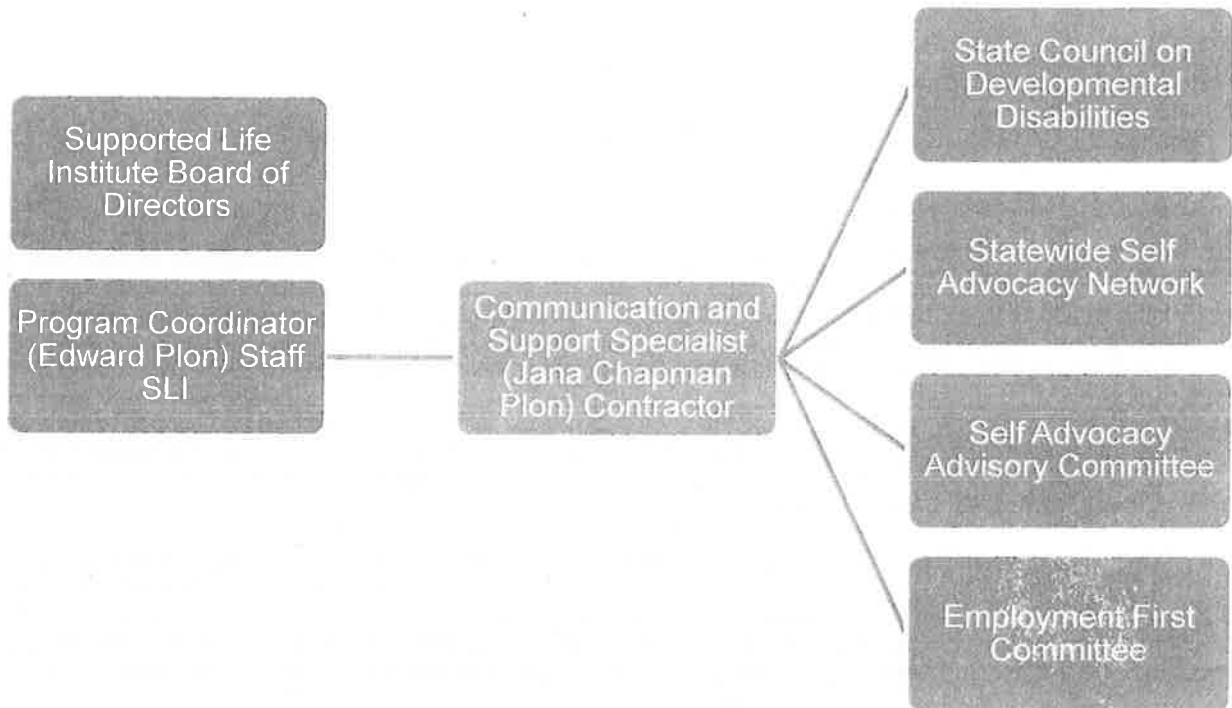
We are pleased to hear that SLI is seeking funds to support State Council on Developmental Disabilities' work to nurture self-advocacy and leadership throughout the state. I am confident Statewide Self Advocacy Network, Self Advocacy Advisory Committee and Employment First Committee will be supported in a professional, cordial and thoughtful way we as an agency have come to associate with SLI. Through the years we have found SLI to be a dependable, dedicated and hard-working partner in the cause of improving the quality of life for people with intellectual disabilities We support the Supported Life Institute's efforts to secure support position for State Council on Developmental Disabilities through its Cycle 36 Self Advocacy Support Grant..

Sincerely,

A handwritten signature in black ink, appearing to read "Kelly Young", with a long, sweeping horizontal line extending to the right.

Kelly Young  
Executive Director  
WarmLine Family Resource Center

**"Serving Families and Professionals Involved with Children with Special Needs."**

**Contractor Organizational Chart for Cycle 36 Self Advocacy Support CPDG**

**Curricula Vitae****Contractor Curricula Vitae**

**Edward Plon, Sacramento, CA**

**August 2007-Current**

**Position:** Self Advocacy Coordinator, Peer Advocacy Connection, Supported Life Institute 2025 Hurley Way Suite 105 Sacramento CA. 95825 (916) 567-1301

**Position Description:**

- Coordinating self advocacy development in the ten counties around Sacramento, supporting twelve different community based self-advocacy groups around Sacramento region.
- Screening, hiring group advisors who are local residents and are familiar with the group and the community. We provide training and funding for the advisors, so groups are adequately supported as they pursue their own self-advocacy related goals and act as independent grass roots organizations in their communities.
- Supporting an advisory committee (Peer Advocacy Connection) composed of self-advocates and their facilitators that meets monthly and advises project on variety of issues related to maintaining and growing self-advocacy movement in the ten counties around Sacramento.

- Organizing Self Advocacy Regional Meetings with the assistance of the PAC. Locating venue, speakers, AV set up etc. We have three SA Regional Meetings a year with 120 or so self advocates attending each meeting.
- Organizing leadership seminar for officers of the chapters. Typically we have one leadership seminar a year with 30 to 40 chapter officers attending. Topics have included: Leadership from the Middle, Growing new leaders in your group, balance between help and self-sufficiency, community outreach and education, legislative and local advocacy.
- Negotiating annual contracts with ACRC to support SA in our region.

**Additional Relevant Duties:** Coordinating Facilitation services and supports for Alta California Regional Center Client Advisory Committee and Board of Directors.

**September 1997-July 2007**

**Program:** Supported Employment, InAlliance, Sacramento, CA

**Position:** Employment Trainer

**Position Description:** Supporting adults with intellectual disabilities in competitive, community based jobs that pay competitive wage.

**Duties:** Person Centered Planning, Prescriptive Placement Strategies, Interfacing with Department of Rehabilitation, Job Development, job training, job site professional and social integration and ongoing services to provide follow along support once client is fully integrated and meeting employers requirements and performance criteria.

**Other Relevant Experience during this period:** Worked as job support with Michael Long, DDS Client Rights Advocate, when he was working on the pilot, statewide “Train the Trainer” model.

**Sept. 1995- July 1997**

**Memory House, Davis CA.-Private Alzheimer’s Care Facility**

**Position:** Assistant Administrator

**Job Description:** Overseeing scheduling of therapeutic services, administration of medications, meal planning, activities, safety, documentation/charting and staffing for a 9 bed Alzheimer’s facility.

**1992-1995**

**Vendor for Alta California Regional Center, Home Based Intensive Behavioral Program for Autistic Children.**

**Description:** Hired and supervised 15 UCD psychology students recruited through UCD career center. Students were trained to implement Ivar Lovaas, UCLA based intensive behavioral program for 3 autistic children. Interfaced with Lovaas trained graduate students from UCLA every 6 months as well as a local behavior intervention vendor hired as additional consultant to supervise consistency of services and data collection.

**Additional duties:** Keeping financial records, submitting billing to ACRC, writing performance reports to UCD career center and leading weekly staff meetings. Orientation and training for new students. Data review with behavioral analyst.

**1988-1992** CSUS: Graduate Program in Studio Art with emphasis on Art Therapy

**1982-1986** New York University, BA History and Near Eastern Languages and Culture

**1979-1982** Forest Hills High School, Forest Hills, New York

**JANA L. CHAPMAN-PLON, RN, BSN SACRAMENTO, CA**

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## PROFESSIONAL SUMMARY

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### **Facilitator**

- Assisting and supporting an individual with developmental disabilities in performing his duties as a member of the Board of Directors and various committees of Alta California Regional Center and the Client Advisory Committee. Skills used include assessment, organization, training, support, teamwork, and encouragement.

### **Chapter Advisor**

- Supporting officers and members of three Self-Advocacy groups in running their own chapters. Assessing officers' and members' abilities, and problem-solving, to best facilitate and foster more independence in this very unique model. This requires a delicate balance between supporting and letting the members manage the chapter themselves to maintain the integrity of the purpose of the organization, which is self-advocacy. Provide transportation, clerical support, and assistance with management of chapter
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finances.

### **Registered Nurse**

- Highly skilled career professional with 16 years practical experience in a hospital care environment.
  - Established in Maternity patient support including assessment of new mothers and newborns, education regarding self/newborn care, medications and treatment, lab work, documentation with care plan, and administration of treatment procedures. Ability to work independently in newborn nursery/observation nursery. Performed new hire orientation and assisted in skills labs.
  - Assessment of patients for hospice care admission using complete systems assessment and computer charting. Educated patients and their families on hospice procedures, benefits, and services in an empathetic and compassionate manner
  - Complete systems assessment. Followed patients from admission to discharge. Collaborated with patients and their families on plan of care and educated them on disease process, self-care, wound care, nutrition, medications, and lab work, as needed. Coordinated care with other specialties such as MDs, Physical Therapists, Social Workers, and Occupational Therapists. Completed documentation in a timely and thorough manner.
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- Computer skilled. Proficient in all documentation/record maintenance/paperwork to ensure accuracy and client confidentiality.
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## CREDENTIALS

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**Registered Nurse License, State of California** 7/1993

**Public Health Nurse License, State of California** 7/1993

**Bachelor of Science in Nursing**

1993

*California State University, Chico, California*

## COMMUNITY SERVICE

**Volunteer** 10/2009

*People First of California Conference, Sacramento, CA.*

**Health Fair Volunteer Nurse**



**Previous Grants and Awards**

**2011-12 Cycle 34 PDF Area Board 3** To develop and support a self advocacy group for people on Autism Spectrum: Autistic Self Advocacy Group (ASAN Sacramento)  
Contact: Michael Rosenberg Executive Director (916) 263-3085 Amount \$ 5,000

**2011-2012, 2012-2013 Yocha DeHe Wintun Nation**-Community Grant: Augmentative Assistive Communication Technology Grant for Communication Technology Education Center Supported Life Institute. Contact: Kristine Stanfill, Yocha Dehe Community Fund, 530-796-3400 Amount \$60,000 each grant cycle

**2010-2011,2011-2012, 2012-13 California Communication Access Foundation-Communication Access Grant-Communication Technology Education Center, Supported Life Institute, Contact CCAF at** : Shelley Bergum Executive Director 1-510-268-4754 Amount: \$ 100,000 each grant cycle

**ATTACHMENTS 1-6**

**ATTACHMENT 1**  
**REQUIRED ATTACHMENT CHECKLIST**

A complete proposal or proposal package will consist of the items identified below. Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.

<b><u>Attachment</u></b>	<b><u>Attachment Name/Description</u></b>
<input checked="" type="checkbox"/> Attachment 1	Required Attachment Check List
<input checked="" type="checkbox"/> Attachment 2	Proposal/Proposer Certification Sheet
<input checked="" type="checkbox"/> Attachment 3	Cost Sheet
<input checked="" type="checkbox"/> Attachment 4	Proposer References
<input checked="" type="checkbox"/> Attachment 5	Payee Data Record (STD 204) The Payee Data Record can be found on the internet at: <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a>
<input checked="" type="checkbox"/> Attachment 6	Contractor Certification Clauses (CCC). The CCC can be found on the Internet at <a href="http://www.ols.dgs.ca.gov/Standard+Languag">www.ols.dgs.ca.gov/Standard+Languag</a>

**ATTACHMENT 2**  
**PROPOSAL/PROPOSER CERTIFICATION SHEET**

This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package in duplicate with original signatures. The proposal must be transmitted in a sealed envelope in accordance with RFP instructions.

**Do not return Section C, Proposal Requirements and Information (pages 3 through 11) of this RFP.**

**For RFP Primary Only:**

- A. Our all-inclusive cost proposal is submitted in a sealed envelope marked **"Cost Proposal - Do Not Open"**.
- B. Place all required attachments behind this certification sheet.
- C. The signature affixed hereon and dated certifies compliance with all the requirements of this proposal document. The signature below authorizes the verification of this certification.

**An Unsigned Proposal/Proposer Certification Sheet May Be Cause For Rejection**  
**ATTACHMENT 2 (Cont.)**

1. Company Name <i>Supported Life Institute</i>	2. Telephone Number <i>(916) 567-1974</i>	2a. Fax Number <i>(916) 567-1977</i>
3. Address <i>2025 Hurley Way #105, Sacramento, CA. 95825</i>		
Indicate your organization type:		
4. <input type="checkbox"/> Sole Proprietorship	5. <input type="checkbox"/> Partnership	6. <input checked="" type="checkbox"/> Corporation
Indicate the applicable employee and/or corporation number:		
7. Federal Employee ID No. (FEIN) <i>68-0261184</i>	8. California Corporation No. <i>C1811845</i>	
9. Indicate applicable license and/or certification information:		
10. Proposer's Name (Print) <i>Sibby McCallough</i>	11. Title <i>President</i>	
12. Signature <i>Sibby McCallough</i>	13. Date <i>May 1, 2013</i>	
14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:		
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> a. California Small Business Enterprise   Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>  If yes, enter certification number: _____ </div> <div style="width: 45%;"> b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>  If yes, enter your service code below: _____ </div> </div>		
<p><b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is</p> <p>Date application was submitted to OSBCR, if an application is _____</p>		

# Cost Proposal Worksheet

Attachment 3 Budget for Cycle 36 CPDG Self Advocacy Support  
October 1, 2013-September 31st, 2014 Supported Life Institute RFP Responder

<b>A. Personnel Services</b>			<b>Subtotals</b>
Wages Project Coordinator	1040 hrs X 25 dollars/hr	26000	
Payroll Tax Expense	12.25%	3185	
Health Insurance Expense	606 per month X 12	7272	
Worker's Comp.		2600	
Total Payroll Expense:			<b>39057</b>
Bookkeeping	240 hrs X 22 dollars/hr	5,280	
Legal/ Accounting	60 hrs X 90 dollars/hr	5400	
Payroll Tax Expense	12.25%	1308	
Worker's Comp.		1200	
Health Insur. Contrib.	300 per month X12	3600	
<b>Total Personnel Services</b>			<b>16,788</b>
<b>B. Consultants/Subcontractor</b>	1560 hrs X 18 dollars/hr	28080	<b>28080</b>
<b>C. Travel Costs Coordinator</b>	300 dollars/month/12 months	3600	
<b>Travel Costs Subcontractor</b>	300 dollars/month/12 months	3600	
			<b>7200</b>
<b>D. Operating Cost</b>			
Postage/Postage Meter	275 dollars X12 months	3300	
Rent	600 dollars X 12 months	7200	
Telephone	60 dollars X 12 months	720	
Copier Rental	75 dollars X 12 months	900	
Packet Printing	200X 12 months	2400	
Miscellaneous Supplies/paper et	200X 12 months	2400	
			<b>16920</b>
<b>E. Administrative Overhead</b>	160,000 X.12	19200	<b>19200</b>
<b>Brochure Printing</b>		5000	
<b>Video Production</b>		7500	
<b>DVD Reproduction</b>		2000	
			<b>14500</b>
<b>AV Lease</b>		3000	
<b>Computers, Programs, AT support</b>		15000	
			<b>18000</b>
<b><u>Total Contract</u></b>			<b><u>159745</u></b>

**ATTACHMENT 3**  
**SAMPLE COST PROPOSAL WORKSHEET**

SAMPLE BUDGET FOR March 2012– October 2014

Line Item	2011- 2012	2012- 2013	2013- 2014	Total
<b>A. Personnel Services</b>				
Salaries hours x hourly rate				
(list all staff)				
Temporary Help				
Staff Benefits				
<b>Total Personnel Services</b>				
<b>B. Consultants/Subcontractors</b>				
(Costs Itemized)				
<b>Total Subcontractors</b>				
<b>C. Travel Costs</b>				
Travel related to contract				
<b>Total Travel Costs</b>				
<b>D. Operating Costs</b> (Not included in Administrative Overhead E.)				
(Itemize per line item)				
<b>Total Operating Costs</b>				
<b>E. Administrative Overhead</b>				
<b>TOTAL CONTRACT</b>				

## ATTACHMENT 4

### PROPOSER REFERENCES

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal will cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

#### REFERENCE 1

Name of Firm	Warmline Family Resource Center	State	CA	Zip Code	95825
Street Address	2025 Hurley Way #100	City		Telephone Number	922-9276
Contact Person	Kelly Young			Value or Cost of Service	\$500
Dates of Service	10-12 - Present				
Brief Description of Service Provided					
Fostering self-advocacy skills among transition-age youth & families.					

#### REFERENCE 2

Name of Firm	UCP - Aero Haven Adult School	State	CA	Zip Code	95660
Street Address	5450 Georgia Dr	City	North Highlands	Telephone Number	390-2853
Contact Person	Lois Rhodes			Value or Cost of Service	\$600
Dates of Service	4/2012 - 11/2012				
Brief Description of Service Provided					
Self advocacy training for program clients, start of SA group. Training for staff, how to support clients & encourage SA, self-determination					

#### REFERENCE 3

Name of Firm	Easter Seals ACE II-III	State	CA	Zip Code	95993
Street Address	1670 Sierra Ave. Ste 601	City	Yuba City	Telephone Number	530-673-4585
Contact Person	Amy Fulk			Value or Cost of Service	\$300
Dates of Service	10-2011 - Present				
Brief Description of Service Provided					
Supporting SA group at the program, materials, training through Regional meetings, Leadership Seminar, PAC meetings					

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**PAYEE DATA RECORD**(Required when receiving payment from the State of California in lieu of IRS W-9)  
STD. 204 (Rev. 6-2003)

<b>1</b>	<b>INSTRUCTIONS:</b> Complete all information on this form. Sign, date, and return to the State agency (department/office) address shown at the bottom of this page. Prompt return of this <b>fully completed</b> form will prevent delays when processing payments. Information provided in this form will be used by State agencies to prepare Information Returns (1099). See reverse side for more information and Privacy Statement. <b>NOTE:</b> Governmental entities, federal, State, and local (including school districts), are not required to submit this form.		
<b>2</b>	<b>PAYEE'S LEGAL BUSINESS NAME</b> (Type or Print) Supported Life Institute <b>SOLE PROPRIETOR - ENTER NAME AS SHOWN ON SSN</b> (Last, First, M.I.) edp1on@supportedlife.org <b>E-MAIL ADDRESS</b> 2025 Hurley Way #105 <b>MAILING ADDRESS</b> 2025 Hurley Way #105 <b>BUSINESS ADDRESS</b> Sacramento, CA. 95825 Sacramento, CA. 95825 <b>CITY, STATE, ZIP CODE</b>		
<b>3</b>	<b>PAYEE ENTITY TYPE</b>  <b>CHECK ONE BOX ONLY</b>  <input type="checkbox"/> PARTNERSHIP <input type="checkbox"/> ESTATE OR TRUST <input type="checkbox"/> INDIVIDUAL OR SOLE PROPRIETOR ENTER SOCIAL SECURITY NUMBER: <span style="border: 1px solid black; padding: 2px;">      -     -      </span>	<b>ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN):</b> <span style="border: 1px solid black; padding: 2px;">68-02611184</span>  <b>CORPORATION:</b> <input type="checkbox"/> MEDICAL (e.g., dentistry, psychotherapy, chiropractic, etc.) <input type="checkbox"/> LEGAL (e.g., attorney services) <input checked="" type="checkbox"/> EXEMPT (nonprofit) <input type="checkbox"/> ALL OTHERS	<b>NOTE:</b> Payment will not be processed without an accompanying taxpayer I.D. number.
<b>4</b>	<b>PAYEE RESIDENCY STATUS</b> <input checked="" type="checkbox"/> California resident - Qualified to do business in California or maintains a permanent place of business in California. <input type="checkbox"/> California nonresident (see reverse side) - Payments to nonresidents for services may be subject to State income tax withholding. <input type="checkbox"/> No services performed in California. <input type="checkbox"/> Copy of Franchise Tax Board waiver of State withholding attached.		
<b>5</b>	I hereby certify under penalty of perjury that the information provided on this document is true and correct. Should my residency status change, I will promptly notify the State agency below. <b>AUTHORIZED PAYEE REPRESENTATIVE'S NAME</b> (Type or Print) Sylvia McCallough <b>TITLE</b> Bd. President <b>SIGNATURE</b> Sylvia McCallough <b>DATE</b> May 1, 2013 <b>TELEPHONE</b> 530, 742-76		
<b>6</b>	Please return completed form to: <b>Department/Office:</b> _____ <b>Unit/Section:</b> _____ <b>Mailing Address:</b> _____ <b>City/State/Zip:</b> _____ <b>Telephone:</b> (____) _____ <b>Fax:</b> (____) _____ <b>E-mail Address:</b> _____		

**CERTIFICATION**

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

Contractor/Bidder Firm Name (Printed) <i>Supported Life Institute</i>		Federal ID Number <i>68-0261184</i>
By (Authorized Signature) <i>Sibby McCallough</i>		
Printed Name and Title of Person Signing <i>Sibby McCallough, Board President</i>		
Date Executed <i>4/30/2013</i>	Executed in the County of <i>Sacramento</i>	

**CONTRACTOR CERTIFICATION CLAUSES**

1. **STATEMENT OF COMPLIANCE:** Contractor has, unless exempted, complied with the nondiscrimination program requirements. (Gov. Code §12990 (a-f) and CCR, Title 2, Section 8103) (Not applicable to public entities.)

2. **DRUG-FREE WORKPLACE REQUIREMENTS:** Contractor will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.

b. Establish a Drug-Free Awareness Program to inform employees about:

- 1) the dangers of drug abuse in the workplace;
- 2) the person's or organization's policy of maintaining a drug-free workplace;
- 3) any available counseling, rehabilitation and employee assistance programs; and,
- 4) penalties that may be imposed upon employees for drug abuse violations.

c. Every employee who works on the proposed Agreement will:

- 1) receive a copy of the company's drug-free workplace policy statement; and,
- 2) agree to abide by the terms of the company's statement as a condition of employment on the Agreement.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both and Contractor may be ineligible for award of any future State agreements if the department determines that any of the following has occurred: the Contractor has made false certification, or violated the

certification by failing to carry out the requirements as noted above. (Gov. Code §8350 et seq.)

3. NATIONAL LABOR RELATIONS BOARD CERTIFICATION: Contractor certifies that no more than one (1) final unappealable finding of contempt of court by a Federal court has been issued against Contractor within the immediately preceding two-year period because of Contractor's failure to comply with an order of a Federal court, which orders Contractor to comply with an order of the National Labor Relations Board. (Pub. Contract Code §10296) (Not applicable to public entities.)

4. CONTRACTS FOR LEGAL SERVICES \$50,000 OR MORE- PRO BONO REQUIREMENT: Contractor hereby certifies that contractor will comply with the requirements of Section 6072 of the Business and Professions Code, effective January 1, 2003.

Contractor agrees to make a good faith effort to provide a minimum number of hours of pro bono legal services during each year of the contract equal to the lessor of 30 multiplied by the number of full time attorneys in the firm's offices in the State, with the number of hours prorated on an actual day basis for any contract period of less than a full year or 10% of its contract with the State.

Failure to make a good faith effort may be cause for non-renewal of a state contract for legal services, and may be taken into account when determining the award of future contracts with the State for legal services.

5. EXPATRIATE CORPORATIONS: Contractor hereby declares that it is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code Section 10286 and 10286.1, and is eligible to contract with the State of California.

6. SWEATFREE CODE OF CONDUCT:

a. All Contractors contracting for the procurement or laundering of apparel, garments or corresponding accessories, or the procurement of equipment, materials, or supplies, other than procurement related to a public works contract, declare under penalty of perjury that no apparel, garments or corresponding accessories, equipment, materials, or supplies furnished to the state pursuant to the contract have been laundered or produced in whole or in part by sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor, or with the benefit of sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor. The contractor further declares under penalty of perjury that they adhere to the Sweatfree Code of Conduct as set forth on the California Department of Industrial Relations website located at [www.dir.ca.gov](http://www.dir.ca.gov), and Public Contract Code Section 6108.

b. The contractor agrees to cooperate fully in providing reasonable access to the contractor's records, documents, agents or employees, or premises if reasonably required by authorized officials of the contracting agency, the Department of Industrial Relations,

or the Department of Justice to determine the contractor's compliance with the requirements under paragraph (a).

7. DOMESTIC PARTNERS: For contracts over \$100,000 executed or amended after January 1, 2007, the contractor certifies that contractor is in compliance with Public Contract Code section 10295.3.

## **DOING BUSINESS WITH THE STATE OF CALIFORNIA**

The following laws apply to persons or entities doing business with the State of California.

1. CONFLICT OF INTEREST: Contractor needs to be aware of the following provisions regarding current or former state employees. If Contractor has any questions on the status of any person rendering services or involved with the Agreement, the awarding agency must be contacted immediately for clarification.

Current State Employees (Pub. Contract Code §10410):

1). No officer or employee shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest and which is sponsored or funded by any state agency, unless the employment, activity or enterprise is required as a condition of regular state employment.

2). No officer or employee shall contract on his or her own behalf as an independent contractor with any state agency to provide goods or services.

Former State Employees (Pub. Contract Code §10411):

1). For the two-year period from the date he or she left state employment, no former state officer or employee may enter into a contract in which he or she engaged in any of the negotiations, transactions, planning, arrangements or any part of the decision-making process relevant to the contract while employed in any capacity by any state agency.

2). For the twelve-month period from the date he or she left state employment, no former state officer or employee may enter into a contract with any state agency if he or she was employed by that state agency in a policy-making position in the same general subject area as the proposed contract within the 12-month period prior to his or her leaving state service.

If Contractor violates any provisions of above paragraphs, such action by Contractor shall render this Agreement void. (Pub. Contract Code §10420)

Members of boards and commissions are exempt from this section if they do not receive payment other than payment of each meeting of the board or commission, payment for preparatory time and payment for per diem. (Pub. Contract Code §10430 (e))

2. LABOR CODE/WORKERS' COMPENSATION: Contractor needs to be aware of the provisions which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions, and Contractor affirms to comply with such provisions before commencing the performance of the work of this Agreement. (Labor Code Section 3700)
3. AMERICANS WITH DISABILITIES ACT: Contractor assures the State that it complies with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to the ADA. (42 U.S.C. 12101 et seq.)
4. CONTRACTOR NAME CHANGE: An amendment is required to change the Contractor's name as listed on this Agreement. Upon receipt of legal documentation of the name change the State will process the amendment. Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.
5. CORPORATE QUALIFICATIONS TO DO BUSINESS IN CALIFORNIA:
- a. When agreements are to be performed in the state by corporations, the contracting agencies will be verifying that the contractor is currently qualified to do business in California in order to ensure that all obligations due to the state are fulfilled.
  - b. "Doing business" is defined in R&TC Section 23101 as actively engaging in any transaction for the purpose of financial or pecuniary gain or profit. Although there are some statutory exceptions to taxation, rarely will a corporate contractor performing within the state not be subject to the franchise tax.
  - c. Both domestic and foreign corporations (those incorporated outside of California) must be in good standing in order to be qualified to do business in California. Agencies will determine whether a corporation is in good standing by calling the Office of the Secretary of State.
6. RESOLUTION: A county, city, district, or other local public body must provide the State with a copy of a resolution, order, motion, or ordinance of the local governing body which by law has authority to enter into an agreement, authorizing execution of the agreement.
7. AIR OR WATER POLLUTION VIOLATION: Under the State laws, the Contractor shall not be: (1) in violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district; (2) subject to cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or (3) finally determined to be in violation of provisions of federal law relating to air or water pollution.
8. PAYEE DATA RECORD FORM STD. 204: This form must be completed by all contractors that are not another state agency or other governmental entity.

# Cost Proposal Worksheet

Attachment 3 Budget for Cycle 36 CPDG Self Advocacy Support

October 1, 2013-September 31st, 2014 Supported Life Institute RFP Responder

			<b>Subtotals</b>
<b>A. Personnel Services</b>			
Wages Project Coordinator	1040 hrs X 25 dollars/hr	26000	
Payroll Tax Expense	12.25%	3185	
Health Insurance Expense	606 per month X 12	7272	
Worker's Comp.		2600	
Total Payroll Expense:			<b>39057</b>
Bookkeeping	240 hrs X 22 dollars/hr	5,280	
Legal/ Accounting	60 hrs X 90 dollars/hr	5400	
Payroll Tax Expense	12.25%	1308	
Worker's Comp.		1200	
Health Insur. Contrib.	300 per month X12	3600	
<b>Total Personnel Services</b>			<b>16,788</b>
<b>B. Consultants/Subcontractor</b>			
	1560 hrs X 18 dollars/hr	28080	<b>28080</b>
<b>C. Travel Costs Coordinator</b>			
	300 dollars/month/12 months	3600	
Travel Costs Subcontractor	300 dollars/month/12 months	3600	
			<b>7200</b>
<b>D. Operating Cost</b>			
Postage/Postage Meter	275 dollars X12 months	3300	
Rent	600 dollars X 12 months	7200	
Telephone	60 dollars X 12 months	720	
Copier Rental	75 dollars X 12 months	900	
Packet Printing	200X 12 months	2400	
Miscellaneous Supplies/paper ei	200X 12 months	2400	
			<b>16920</b>
<b>E. Administrative Overhead</b>			
	160,000 X.12	19200	<b>19200</b>
<b>Brochure Printing</b>			5000
<b>Video Production</b>			7500
<b>DVD Reproduction</b>			2000
			<b>14500</b>
<b>AV Lease</b>			3000
<b>Computers, Programs, AT support</b>			15000
			<b>18000</b>
<b><u>Total Contract</u></b>			<b><u>159745</u></b>

### **Budget Narrative**

A. Personnel Services: These are salary, tax and other expenses associated with Project Coordinator position. Contractor has budgeted 20 hrs per week maximum for 52 weeks of Project Coordinator time to be devoted to the oversight, reporting and consultation for the project. SLI board of directors has determined the rate of 25 dollars per hour would be reasonable considering position's responsibility and required level of experience etc.

Based on previous experience and consulting with other non-profits, contractor set payroll tax expense at 12.25.

Health Insurance Expense is current health insurance premiums paid by SLI for this employee.

Bookkeeping and accounting will cover extra cost and time invested by our bookkeeper and accountant in integrating grant finances, billing and expenditures into the context of SLI budget.

Bookkeeper is budgeted for maximum twenty hours a month at his current rate of 22 dollars/hr, while our accountant is budgeted for 5 hrs a month at her rate of 90 dollars per hour.

Payroll, Health, Workman's comp expense contribution to our payroll expenses related to bookkeeper and accountant positions.

B. Consultant/Subcontractor: contractor budgeted a maximum of 30 hours per week for our subcontractor, Communication and Support Specialist to accomplish all the tasks necessary to support SAAC, SSAN, EFC and State Council for a total of 1560 hours a year. SLI board established her rate at 18 dollars/hr. for a total annual expenditure of 28080 dollars.

C. Travel costs were estimated based on anticipation that both Project Manager and Communication and Support Specialist may have to travel occasionally to other parts of the state in addition to regular automobile travel around Sacramento. Travel billing will comply with state travel and per diem guidelines.

D. Operating costs are based on current SLI expenditures by comparable size project. Some expenditures are set higher to accommodate possible higher mail requirements as well as printing because the project is statewide in scope.

E. Administrative overhead is set at 12% of the total grant amount as specified in the RFP.

Brochure Printing, Video Production and DVD reproduction are all deliverables that may depend on SCDD management request. Contractor has set these values to accommodate high production values and quality of printing to meet SCDD quality expectations as well as possibly higher quantity of items such as DVD's for statewide distribution.

Contractor budgeted for AV lease as our experience shows this is a critical piece of equipment for good meetings and having back up audio, video equipment or good vendor to provide them or troubleshoot the one you have is critical.

A computer, Programs, AT support addresses expansion of already present equipment array and augmenting some communication or other equipment per RFP expectations. Contractor understands that any equipment purchased will be property of the State Council, unless its cost is under one thousand dollars or has a normal useful life of less than 3 years.





## Futures Explored, Inc.

Providing Support 3547 Wilkinson Lane  
for Adults with Lafayette, CA 94549  
Developmental Phone 925.284.3240  
Disabilities Fax 925.284.3291

**GARDEN Antioch**  
625 West Fourth Street  
Antioch, CA 94509  
Phone 925.756.0817  
Fax 925.756.7172

**GARDEN Tri-Valley**  
690 North L Street  
Livermore, CA 94551  
Phone 925.454.3349  
Fax 925.454.8807

**GARDEN Brentwood**  
1191 Central Boulevard  
Suite B  
Brentwood, CA 94513  
Phone 925.626.3642  
Fax 925.626.3645

50 Guthrie Lane  
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**ALIVE East**  
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Antioch, CA 94509  
Phone 925.779.1039  
Fax 925.779.0440



**Vocational Training  
& Employment**

1029 J Street  
Suite 380  
Sacramento, CA 95814  
Phone 916.442.5409  
Fax 916.442.7364

April 29, 2013

State Council on Developmental Disabilities  
Attn: Kristie Allensworth  
1507 21<sup>st</sup> Street, Suite 210  
Sacramento, CA 95811

RE: RFP – Self Advocacy Support Grant

Dear Ms. Allensworth,

Futures Explored, is pleased to submit this response to your request for proposals to support the self-advocacy development of the State Council. We are submitting this request on behalf our Project SEED (Seeking Equality through Education and Demonstration) Advocates, who will be the key implementers of this proposal. Project SEED has continued to lead the way in our area as a positive force for change and regularly demonstrating the contributions those individuals with disabilities can make when appropriately supported.

Futures Explored, is continuing to act as the administrative support provider in this grant to ensure that the individuals we support may devote the appropriate time and energy to the successful completion of this grant. Given the number of unknowns within the process that needs to be undertaken, we have chosen to submit a one-year grant and will apply for a second year of funding if it is available, once all of the support needs, direction and other issues are better understood by us.

We have carefully read and understand all the provisions in this RFP and agree to be bound by them. We fully read and reviewed the terms and conditions as stated in the State Contracting Requirements, attached to the RFP, and, that by submitting a response understands that this document represents the agreement that we will be expected to execute if we are successfully awarded a Cycle 36 CPDG from the SCDD.

As Executive Director, I have the authority to bind the organization in such matters as this RFP. If you have any questions, please do not hesitate to contact me at (925) 284-3240, ext. 214 or [willsanford@futures-explored.org](mailto:willsanford@futures-explored.org).

Sincerely,

Will Sanford  
Executive Director

Encl: 1 Original and 1 copy of the full grant proposal  
1 Video Example from 211 LA County  
1 Plain English Example <sup>197</sup>Working with SSI

# **Futures Explored – Project SEED**

## **Self-Advocacy Support Grant Proposal**

**Submitted By:  
Futures Explored, Inc.  
3547 Wilkinson Lane  
Lafayette, CA 94583  
(925) 284-3240**

# Futures Explored – Project SEED – Self-Advocacy Support Grant Proposal

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## **Self – Advocacy Support Grant – Statement of Purpose**

The State Council on Developmental Disabilities has stated as one of their objectives the following:

“The Council will promote the stability and expansion of a statewide self-advocacy network through financial and in-kind support, which includes ensuring that local delegates are able to participate effectively in statewide meetings and events.”

Futures Explored, Inc. has been committed for almost 50 years to ensuring that individuals with developmental disabilities are fully included and valued members of their community. Inclusion and value are not simply given to those who say they want it, but must be earned through education, demonstration and consistent messaging to the individuals we support, the staff who support them and the community at large. It is not a simple task and one that takes persistent and conscious effort to make a reality.

Five years ago our Consumer Action Committee was founded by a group of self-advocates and after considerable debate they focused on the key word of Action versus Advisory in their title. They were then and have continued to expand their talents to be an action oriented group, whose purpose is to educate and demonstrate to the world that individuals with developmental disabilities should be equal partners in any discussion about individuals with developmental disabilities. Their efforts expanded when they were provided the opportunity within Area Board 5 to do outreach and education on how to build successful advocacy networks and did presentations and trainings to over 800 consumers and their support staff.

This proposal is an opportunity to expand our Project SEED (Seeking Equality through Education and Demonstration) advocacy training and support efforts. Project SEED is

run by a Board of Advocates with staff support, the advocates direct the efforts from scheduling requests, creating training materials, conducting the trainings and support offerings and finding experts to help educate them on issues, prior to making decisions on how to proceed. Futures Explored provides the support staff under the direction of the Project SEED Board to support the advocates to ensure their voice is clearly heard, in their words, expressed how they want it expressed. The Project SEED Board has set the wages and/or stipends paid to participants for carrying out the various functions necessary to meet the activities they have set to carry out, Futures Explored, acts as the Employer of Record and Financial Intermediary for their efforts.

Project SEED uses an iterative (using round robin discussions, research efforts, clarifying materials, further discussion and hopefully ending with a consensus position to move forward) process in developing its materials, concepts, presentations, understandable language and often tests those with others to make sure they have developed the message they want to deliver. They receive technical support from Futures Explored staff in building the presentations, using a private network to communicate as they process information and add ideas to the mix. They have provided significant support to Futures Explored in developing readily understandable documents, helping to refine policy and procedures and educating staff to the difference between “caring for someone” and supporting someone to live their life.

Futures Explored is pleased to support Project SEED's desire to support others to achieve their dreams.

## **Self-Advocacy Support Grant – Proposal Narrative**

### **Work Plan –**

- The initial effort would be to work with each identified group (SSAN – Statewide Self-Advocacy Network, SAAC – Self-Advocacy Advisory Committee, EFC – Employment First Committee) to understand all of the following:
  - The committee's current communication styles
  - The types of technology they currently use and/or are interested in using in the future
  - How the members get information, understand that information and can best express their opinions
  - The meeting schedule for the year, including lead times, key leadership individuals, who will need to be in contact to help plan the actual work flow and support needs. From this, an actual schedule for each committee and leadership arena will be developed and provided to the Chair of each committee and the SCDD
  - Getting a baseline understanding of how the members of each committee perceive their "status" as contributing members of their committee, as well as how the other committee members perceive their status
  - Getting the current goals and objectives of each committee, what strategies the committee has used to move towards those goals and how well the committee understands the goal and ultimate outcome they are trying to achieve.

- Building on the current goals and objectives of each committee, the team will help to develop the strategies, identify resources needed and steps that need to be taken in order to achieve the current goals and start developing the next series of goals.
- **Statewide Self-Advocacy Network (SSAN)** – based on the RFP the development of the long range plan for the group will be the primary focus, including ways to increase input from across the State, supporting each member to ensure that their voice and ideas are heard, developing a clear and direct series of steps to ensure the long-term growth of the Statewide Self-Advocacy Network into an independent organization.
- **Self-Advocacy Advisory Committee (SAAC)** – based on the RFP the key effort will be to focus on increasing the advocate's skills so they are viewed as key resources and leaders for the State Council. Advocates have to be better prepared, focused and clear on the outcomes they want to achieve, if they want others to listen, discuss and take action. The Advocates need to learn to evaluate, understand, plan and craft positive messages to educate the other members of the Council and the general public and build greater community acceptance and involvement for all individuals with disabilities.
- **Employment First Committee (EFC)** – based on the RFP the key effort will be to help the advocate members of the committee, understand the issues, get input from the individuals they represent, review materials for discussion, help the overall committee work in plain language, focused on the goal of increasing employment opportunities for individuals with disabilities.

- Meeting Logistics – is about preparation, problem solving, understanding the needs of the individuals being supported, adjusting frequently, training others on the best way to hold meetings in a way that all voices are heard, can be understood and all contributions are acknowledged. This can involve the use of technology, the development of plain language documents, means for people to understand even if they have different processing time frames. Support for each committee will be structured to meet everyone's needs, to build an inclusive environment where everyone is heard and the goals of the group are met.
- Training and education is key to increasing the ability of everyone with a disability to advocate for their own needs, contribute to their community and be a valued member of their community. Project SEED has developed a number of trainings that focus on developing personal skills, linking those skills to presentation skills, and actively using those skills in each person's life.
- Video Products – Project SEED will partner with Inclusion Films, run by Joey Travolta to support the development of two professional training videos. Inclusion Films works to provide employment to individuals with developmental disabilities in the film and media industry. Inclusion Films has made a number of Public Service Announcements, training videos and helped a number of individuals achieve their dreams of working in the media industry.
- Project SEED has significant experience in taking complex issues and making them understandable to all, things such as why working makes sense, helping develop materials to promote H1N1 vaccinations for individuals with disabilities



and their caregivers, as well as helping others understand the lives of individuals with disabilities.

- Technology has created many opportunities to expand the ability of individuals with disabilities to understand, research issues, and communicate more effectively while making allowances for individual need. Project SEED members use a variety of communication devices, on-line resources, private Facebook-like system to communicate with each other to allow ongoing discussion, share research, and work on consensus building.
- Technical support to Area Boards and local regions – Project SEED was born out of a project like this, last year Area Board V contracted with Futures Explored to support Project SEED to reach out and provide advocacy trainings to over 800 individuals across the 5 counties of Area Board V catchment area.

#### **Measurable Goals –**

- We plan to evaluate the impact of our efforts on increasing the skills, self-esteem and impact that each advocate makes. This will be done with a series of self-evaluations and questionnaires of both the advocates and other committee members to gauge the impact of our efforts to support their advocacy growth over the year.
- The completion of the training videos and other training documents as outlined by the Self-Advocacy Committee's will be key outcomes of the year.
- Providing leadership coaching to both the Advocates on the SSAN, SACC and EFC, as well as to others to increase the skills, abilities and confidence of all advocates will be a key measure of success.

- Fostering the use of clear and understandable language by all members of the State Council will be a goal of the group. The measurement of communication styles, verbal and non-verbal, auditory and non-auditory and finding ways to ensure understanding by all.
- Fostering the appropriate use of technology to enhance understanding, communication and independent voice will be a focus of the evaluation process.

#### **Key Players –**

- Project SEED – As a group of advocates and consultants with developmental disabilities, Project SEED will be the primary staff to this project and receive support from their current support staff to help facilitate all meetings, communication, clarifying discussions, material development, training development and evaluation of outcomes.
- Zigma Consulting – Eric Zigma as the owner and lead consultant is working with Project SEED and the CAC at Futures Explored to really look at the impacts of their advocacy efforts, including the personal changes and the community impacts they have made. Project SEED will use Eric as the primary consultant to help build the evaluation model for this project, in a pre/during/post evaluation process.
- Inclusion Films – Joey Travolta and his team will work with Project SEED and the SSAN to identify the possible training videos they would like produced, then in consultation with the team develop the story board, script, identify the actors, any special voice overs and then produce the 15 minute videos. As Inclusion Films now operates in programs in Burbank, Bakersfield, Livermore and by the time

this contract starts in Sacramento, the ability to get a wide range of potential “shoots” using different real life actors should be possible.

- Futures Explored Support Staff – Futures Explored will have several support staff involved in this project, Josh Sullivan, ALIVE Program Coordinator and Danon Jenkins, LSA III have been a part of the Project SEED support team from the beginning and can support the Lead Advocates through any of the processes needed for successful completion of the project. Additional resources, such as the Futures Director of Information Technology will work with Project SEED’s technical advocates to support them as needed and Will Sanford, Executive Director will continue his role in providing information and referrals to help ensure that information from all sides of an issue or concern is available to the advocates as they have their discussions and throughout their decision making process

#### **Evaluation Plan -**

- .Project SEED in partnership with each committee will develop an evaluation plan that is consistent with the goals and outcome of that committee and submit to the Committee and the SCDD for approval. Deliverables will be identified, measures for ensuring appropriate Leadership Coaching, and appropriate support for each committee will be established.

#### **Project Teams Qualifications –**

- Project SEED’s lead advocates have over 5 years of experience in developing their personal advocacy confidence, as well as leadership skills that has allowed them to help many others start down the path of becoming self-advocates.

Project SEED was started to provide services to other agencies, interested groups and Futures Explored in the areas of:

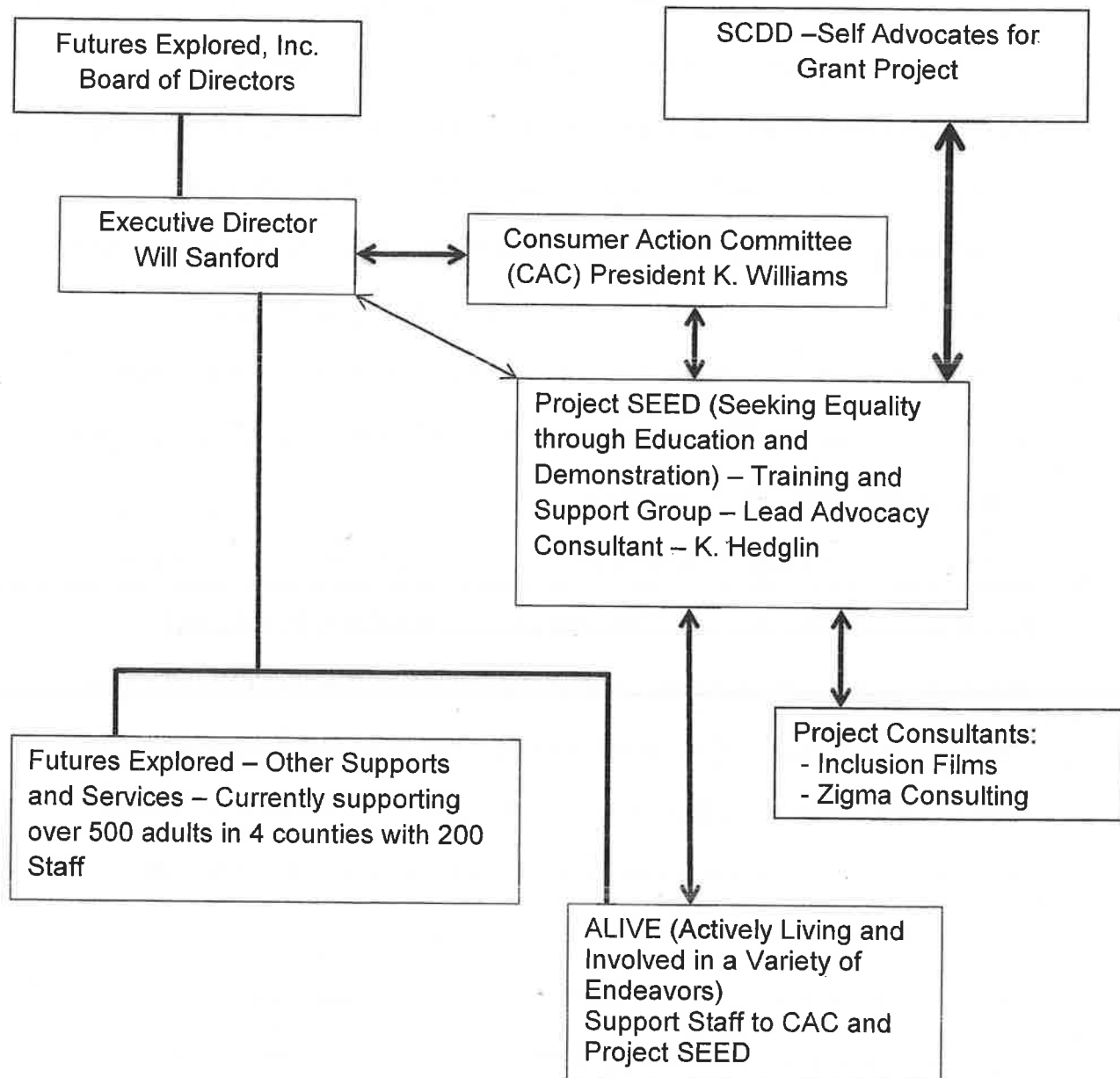
- Helping to train new staff to support dreams and goals rather than care for individuals with disabilities.
  - Provide technical writing to make sure that Consumer and Employee handbooks and other materials were clear, concise and understandable by all.
  - Take educational material, such as the complex issue of SSI and create informational handouts to help others understand the value of work.
  - Communication development and processing has been a key learning component for all, as the group wants to make sure everyone can contribute and everyone understands, so constant research and experimentation is undergone to find out how new technology can be brought to bear on an issue.
- Inclusion Films has been working for the last 8 years to demonstrate that individuals with developmental disabilities can find employment and careers in the media and film industry. Inclusion Films has used all aspects of the media and film industry as a place to provide real world experience to individuals with developmental disabilities and build resumes that lead to employment. Inclusion films has made a number of films, documentaries, Public Service Announcements and educational/training videos for a variety of companies using individuals with disabilities in all aspects of the production, from writing, acting, directing, camera and lighting, music, voice overs and editing to create

professional media results. An Inclusion Film staff was involved with one of Project SEED's last major advocacy/education events, where they emceed the East Bay Legislative Townhall meeting for 3 hours to a group of over 200 individuals including 7 current legislators and 14 legislative staff and they developed a brief "day in the life" video that ended the townhall meeting.

- Zigma Consulting for the last 9 years has been active in working on measuring quality impacts of significant systems change within the developmental disabilities field including, helping to develop the Bay Area Quality Management System linked to the closure of Agnews Developmental Center. Zigma consulting has worked with Project SEED to help look at ways to measure the impact of their advocacy education, leadership and community change activities, both personally and to the community.
- Futures Explored support staff are key in ensuring that the needs of the Project SEED team are met, that the necessary support, whether it be logistical, technical, information gathering or other is provided so that they may effectively develop strategies and efforts to achieve their overall goal of increasing the skills of those who want to be advocates. The staff has a wide range of experience and contacts that are used to make sure accurate and complete information is available to the team.
- Futures Explored key management staff have over 60 years of experience in supporting individuals with significant disabilities to be recognized in their community as valuable assets and will lend support as requested by Project

SEED to provide them with information, referral sources and technical expertise to ensure the success of the project

**Organizational Chart -**



### **Previous Grants/Awards**

- Area Board V/SCDD - \$ 10,000 Grant (FY 2011-12) to promote and increase self-advocacy within the Area Board Catchment Area. (Contact: Rocio Smith – 510-286-0439)
- Dean and Margaret Lesher Foundation - \$ 10,000 Grant (FY 2012-13) to support the development of a Film and Media Workshop for Adults with Developmental Disabilities in the East Bay. (Contact: Kathleen Odne – 925-935-9988)
- Contra Costa County – Health Services Department - \$ 18,600 (FY 2010-11) to support the development and outreach of an H1N1 Vaccination campaign to individuals with developmental disabilities and their support staff (an under vaccinated population). (Contact: Wendel Brunner, M.D. – 925-313-6836)
- Thomas J Long Foundation - \$ 100,000 Grant (FY 2010-11) to support the renovation and retrofitting of one of Futures Explored Program sites. (Contact: Bob Coakley – 925-944-3800)
- HEDCO Foundation - \$ 16,243 Grant (FY 2010-11) to support the renovation and retrofitting of one of Futures Explored Program site. (Contact: Mary Goriup – Box 339, Danville, CA 94526)

### **Budget Narrative –**

The Budget is found in attachment 3 and this narrative describes the various sections of the cost proposal:

- Personnel services – Staffing costs for the Project SEED Lead  
 Advocates/Facilitators and Technical support individuals, all of whom are individuals with disabilities. The only additional salaries is under Temp Help would be the required Overtime or additional support staff time required to support the Advocates/Facilitators while at meetings. The support staff costs are an in-kind contribution, outside of the overtime/additional costs. The Staff benefits are all of the required personnel related costs.
- Consultants/Subcontractors – Project SEED is proposing to use two primary sub-contractors:
  - Inclusion Films – Will provide all of the technical support for the development, shooting and production of the two 15 minute training videos. We are proud to partner with Inclusion Films because of its regular employment of individuals with disabilities in all aspects of their production company. The estimated cost is based on their production of the 211 film a 15 minute film.
  - Zigma Consulting – will provide the technical support on the evaluation system for this project. Mr. Zigman has extensive experience with developing outcome measurements and we are excited by our current work with him in trying to develop means to measure the impact of our advocacy work.
- Travel costs – Are the best projections for the cost of overnight and travel to and from meetings as needed to meet the proposal.



- Operating Costs – Are the best projections of supplies/materials and communication costs directly related to this project.
- Administrative Overhead – Futures Explored, has continually supported our efforts to expand our advocacy efforts, education and training and provides us with payroll, administrative and billing/grant tracking services. Their back end office support has allowed us to stay focused on our primary efforts of education and training.

## **Attachment 1**

### **Required Attachment Checklist**

**ATTACHMENT 1**  
**REQUIRED ATTACHMENT CHECKLIST**

A complete proposal or proposal package will consist of the items identified below. Complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to the State. For your proposal to be responsive, all required attachments must be returned. This checklist should be returned with your proposal package also.

<u>Attachment</u>	<u>Attachment Name/Description</u>
<input checked="" type="checkbox"/> Attachment 1	Required Attachment Check List
<input checked="" type="checkbox"/> Attachment 2	Proposal/Proposer Certification Sheet
<input checked="" type="checkbox"/> Attachment 3	Cost Sheet
<input checked="" type="checkbox"/> Attachment 4	Proposer References
<input checked="" type="checkbox"/> Attachment 5	Payee Data Record (STD 204) The Payee Data Record can be found on the internet at: <a href="http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf">www.documents.dgs.ca.gov/osp/pdf/std204.pdf</a> .
<input checked="" type="checkbox"/> Attachment 6	Contractor Certification Clauses (CCC). The CCC can be found on the Internet at <a href="http://www.ols.dgs.ca.gov/Standard+Language">www.ols.dgs.ca.gov/Standard+Language</a>

**Attachment 2**

**Proposal/Proposer Certification Sheet**

**ATTACHMENT 2**  
**PROPOSAL/PROPOSER CERTIFICATION SHEET**

This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package in duplicate with original signatures. The proposal must be transmitted in a sealed envelope in accordance with RFP instructions.

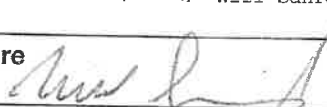
**Do not return Section C, Proposal Requirements and Information (pages 3 through 11) of this RFP.**

**For RFP Primary Only:**

- A. Our all-inclusive cost proposal is submitted in a sealed envelope marked "Cost Proposal - Do Not Open".
- B. Place all required attachments behind this certification sheet.
- C. The signature affixed hereon and dated certifies compliance with all the requirements of this proposal document. The signature below authorizes the verification of this certification.

**An Unsigned Proposal/Proposer Certification Sheet May Be Cause For Rejection**

**ATTACHMENT 2 (Cont.)**

1. Company Name      Futures Explored, Inc	2. Telephone Number (925) 284-3240	2a. Fax Number (925) 284-3291		
3. Address 3547 Wilkinson Lane, Lafayette, CA 94549				
Indicate your organization type:				
4. <input type="checkbox"/> Sole Proprietorship	5. <input type="checkbox"/> Partnership	6. <input checked="" type="checkbox"/> Corporation		
Indicate the applicable employee and/or corporation number:				
7. Federal Employee ID No. (FEIN) 94-1567161	8. California Corporation No. C0463331			
9. Indicate applicable license and/or certification information:				
10. Proposer's Name (Print)      Will Sanford	11. Title      Executive Director			
12. Signature 	13. Date      4/29/13			
14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:				
<table style="width: 100%;"> <tr> <td style="width: 50%;"> a. California Small Business Enterprise   Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>  If yes, enter certification number: _____ </td> <td style="width: 50%;"> b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>  If yes, enter your service code below: _____ </td> </tr> </table>			a. California Small Business Enterprise  Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, enter certification number: _____	b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, enter your service code below: _____
a. California Small Business Enterprise  Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, enter certification number: _____	b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, enter your service code below: _____			
<p><b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is</p> <p>Date application was submitted to OSBCR, if an application is _____</p>				

Page 28

## **Attachment 3**

### **Cost Sheet**

**Attachment 3**  
**Cost Proposal Worksheet for Futures Explored**

Line Item	2013 - 2014	In-Kind Support
<b>A. Personnel Services</b>		
- Staffing		
- Facilitator A ( A. Sysum)	\$ 10,400	
- Facilitator B (K. Hedglin)	\$ 10,400	
- Facilitator C (K. Williams)	\$ 10,400	
- Facilitator D (C. Tolentiono)	\$ 10,400	
- Technical Support (CT & KC)	\$ 5,200	
- Temporary Help (Additional support Time)	\$ 9,000	\$ 35,304
- Staff Benefit Costs	\$ 11,160	\$ 10,591
<b>Total Personnel Services</b>	<b>\$ 66,960</b>	<b>\$ 45,895</b>
<b>B. Consultants/Subcontractors</b>		
- Inclusion Films	\$ 60,000	
- Zigma Consulting	\$ 5,625	
<b>Total Consultants/Subcontractors</b>	<b>\$ 65,625</b>	
<b>C. Travel Costs</b>		
- Hotel	\$ 6,000	
- Mileage	\$ 2,475	
- Other Travel	\$ 1,800	
<b>Total Travel Costs</b>	<b>\$ 10,275</b>	
<b>D. Operating Costs</b>		
- Supplies	\$ 1,500	
- Communication	\$ 750	
<b>Total Operating Costs</b>	<b>\$ 2,250</b>	
<b>E. Administrative Overhead (10%)</b>	<b>\$ 14,511</b>	<b>\$ 4,590</b>
<b>Total Proposed Costs</b>	<b>\$ 159,621</b>	<b>\$ 50,485</b>

**Attachment 4**

**Proposer References**



## ATTACHMENT 4

### PROPOSER REFERENCES

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal will cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

#### REFERENCE 1

Name of Firm	Marin Ventures	City	San Rafael	State	CA	Zip Code	94903
Street Address	350 Merrydale Road						
Contact Person	Jami R. Davis, Ph.D.			Telephone Number	(415) 472-4961		
Dates of Service				Value or Cost of Service	Grant Funded		
Brief Description of Service Provided	Advocacy training and presentation for the People First of Marin County						

#### REFERENCE 2

Name of Firm	CARE Parent Network	City	Martinez	State	CA	Zip Code	94553
Street Address	1340 Arnold Drive, #115						
Contact Person	Carolyn Smith Ortiz			Telephone Number	(925) 313-0999		
Dates of Service	April 2012			Value or Cost of Service	grant funded		
Brief Description of Service Provided	A presentation to a group of transition aged individuals and their parents.						

#### REFERENCE 3

Name of Firm	S.T.E.P.	City	Sacramento	State	CA	Zip Code	95825
Street Address	2330 Glendale Lane						
Contact Person	Jacquie Dillard-Foss			Telephone Number	(916) 679-1555 X. 107		
Dates of Service	4/11/13			Value or Cost of Service	\$ 0		
Brief Description of Service Provided	Project SEED planned, organized and directed a rally on the steps of the Capitol that over 300 individuals attended. Several members were interviewed by the local press.						



## **Marin Ventures**

*Helping people with disabilities work and live in the community.*

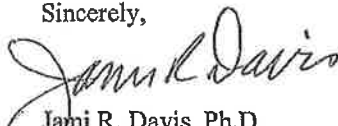
April 25, 2013

To whom it may concern:

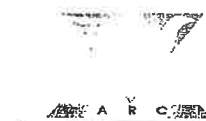
I am writing to recommend Project SEED for a SCDD grant for self-advocacy. Project SEED came to present at a People First of Marin meeting last year. As an advisor to People First of Marin, and someone who has worked in the field of developmental disabilities for 25 years, I was impressed with their presentation. The presenters were articulate and poised. The self-advocates in Marin saw how training and the opportunity to speak up to peers and others makes a difference. Technology, in the form of a projected presentation, added polish to the presentation. The three presenters were obviously comfortable with their roles and their interactions with the audience of self-advocates were helpful.

The members of Project SEED appear many places I go for grassroots advocacy. I have observed one of the members during a visit to a local legislator in his Sacramento office. She took the lead in the meeting, presenting her ideas about how the budget cuts of the past few years have impacted her life. I have seen Project SEED members speak at legislative hearings. Project SEED has a proven record of successful self-advocacy and leadership outreach. With the members' talent, ambition, and skills, Project SEED merits further investment in its endeavors.

Sincerely,



Jami R. Davis, Ph.D.  
Executive Director



# CARE PARENT NETWORK

CONTRA COSTA 1340 Arnold Drive, Suite 115 Martinez, CA 94553 ph 800.281.3023 ph 925.313.0999 fax 925.370.8651

April 25, 2013

To Whom It May Concern:

I am writing to give my support to Project SEED. Project SEED is an amazing group of people who make the world a better place for people with disabilities each and every day.

Last spring, Care Parent Network, a family resource center that supports families of children and young adults with disabilities, invited Project SEED to speak to a group of parents and young people. The Project SEED crew was specifically invited to talk about the work that they do, as well as to speak about self-advocacy. The group brought a power point presentation that spoke to these topics and discussed how their use of social media aided in the goals that the group had set for itself.

This group of engaging people spoke candidly and with passion of the lives that they have created for themselves and the journey that took them there. The parents in the room, many of whom had spent years hearing what their child couldn't do, were awed by this presentation. More importantly, perhaps, the young people who came to the presentation saw possibilities for themselves.

The presentation by Project SEED was one of the best presentations that I have had the honor to host and I have hosted many. I give my heartfelt recommendation to this group.

Please feel free to contact me if you should have any questions.

Sincerely,

Caroline Smith Ortiz  
Program Director



To Whom it may concern,

It is my pleasure to recognize Project SEED for their hard work and dedication in seeking equality for all persons with developmental disabilities. Project SEED has presented to the STEP program and the information they provided through the use of a variety of technologies was extremely helpful! Additionally, Project SEED has worked with my organization and others including California People First in planning and hosting a wide variety of grassroots events, the most recent of which was a statewide rally at the Capitol on 4/11/13 they were the emcee's for. This rally gained media coverage across the state of California. This was a true turning point in the self-advocacy movement in my opinion, Project SEED and California People First stood for their brothers and sisters still institutionalized and demanded a life of inclusion and equality, they did not follow, they were the lead and that made all the difference in how the message was delivered.

This group of self-advocates is very dedicated in each of their endeavors. Their protests and rallies have helped to raise awareness of the challenges that people with developmental disabilities face in their community. Political leaders recognize them as the voice of their community. They are respected and recognized at legislative hearings as an authority on developmental disability issues.

The leadership of self-advocates is critical in the raising of awareness and understanding. For too long the approach has been for the self-advocates to follow the lead of others, what Project SEED has shown is that when self-advocates take their rightful place as the leaders in the disability movement it truly makes all the difference.

I believe that partnering with project SEED would stand to strengthen the voice of person centered and technology driven advocacy across the state. Your support in helping this advocacy group will expand their horizons to make a difference in many more lives!

Sincerely,  
Jacquie Dillard-Foss  
jacquied@stepagency.com  
CEO, S.T.E.P  
916-679-1555 Ext 107  
2330 Glendale Lane  
Sacramento, Ca. 95825

## ATTACHMENT 4

### PROPOSER REFERENCES

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal will cause your proposal to be rejected and deemed nonresponsive.

List below three references of similar types of services performed within the last five years. If three references cannot be provided, please explain why on an attached sheet of paper.

#### REFERENCE 1

Name of Firm	211 LA County			
Street Address	526 W. Las Tunas Drive	City	San Gabriel	State CA Zip Code 91776
Contact Person			Telephone Number	(626) 350-1841
Dates of Service			Value or Cost of Service	30,000
Brief Description of Service Provided	Developed and produced a 15 minute documentary for 211 LA County, called "Real People, Real Help, Reel Stories" A copy of which is provided			

#### REFERENCE 2

Name of Firm	Student Services University of California, Irvine			
Street Address	Anteater Instr. Suite	City	Irvine	State CA Zip Code 92697
Contact Person	Liza B. Krassner		Telephone Number	(949) 824-2358
Dates of Service	October/November 2012		Value or Cost of Service	\$12,500
Brief Description of Service Provided	Produced a short film about the Integrated Competitive Employment Project for marketing employment for individuals with intellectual and developmental disabilities in Orange County.			

#### REFERENCE 3

Name of Firm	Uber Content			
Street Address	1040 n. las palmas ave,	City	Hollywood	State CA Zip Code 90038
Contact Person	Phyllis Koenig		Telephone Number	(323) 860-8686
Dates of Service	October 2012		Value or Cost of Service	\$ 3,000 in wages
Brief Description of Service Provided	Provided Production Assistants for a commercial shoot of a Wendy's commercial who were graduates of Inclusion Films Film and Media Workshop program.			



## 211 LA COUNTY

INFORMATION AND REFERRAL FEDERATION OF LOS ANGELES COUNTY  
*Serving Los Angeles County since 1981*

November 5, 2012

Dear Joey,

We are very excited about our partnership with Inclusion Films to create a video for our first 211 Day celebration and we think this is a perfect match. Not only is Inclusion Films producing our Safely Surrender Baby PSA campaign, your team will also assist 211 LA County with our marketing and public relations plans for the event.

As you know, **211 LA County** answers close to 500,000 calls for help each year and connects callers to health and mental health services, emergency food and shelter, and programs for children and seniors. **211 LA County** functions as a gateway to the County's vast and complex social service delivery system and is recognized as a leader in the field. Our innovative Developmental Screening Program identifies children with autism and other developmental delays through a telephone screening that ensures they are identified and connected to services early when it can do the most good.

We see our partnership with Inclusion Films as an excellent opportunity to highlight our shared commitment to service, innovation and collaboration, and we hope to inspire others to do the same. Just as 211 LA County provides opportunities to those who are often overlooked, we celebrate Inclusion Films mission to create a brighter future for their students.

Continued success!

A handwritten signature in dark ink, appearing to read 'Sharon H.', is written above a horizontal line.

526 W. Las Tunas Drive, San Gabriel, California 91776 • PHONE 626.350.1841 • FAX 626.442.8940  
[www.211LACounty.org](http://www.211LACounty.org)



über content  
1040 n. las palmas ave., bldg. 7n  
hollywood, ca 90028  
t: (323) 860 8686 / f: (323) 860-8689  
www.ubercontent.com

November 2, 2012

Dear Joey and Inclusion Films team,

We just wrapped our first commercial shoot where we employed Inclusion Films' graduates and it will definitely NOT be our last! We're happy, and our client, Wendy's is thrilled and the level of professionalism being taught by your team made for a welcome addition to our crew.

I'm happy to recommend Inclusion Films for employment to anyone in the entertainment industry and beyond. The collaboration was great for everyone involved.

Thank you and keep up the GREAT work!

All my very best,

A handwritten signature in dark ink, appearing to read "Phyllis Koenig".

Phyllis Koenig

Owner / Executive Producer / Über Content



Student Services Office  
Program in Public Health  
Anteater Instruction & Research Bldg.  
Suite 2010, 2<sup>nd</sup> Floor  
University of California, Irvine  
Irvine, CA 92697-3957  
(949) 824-2358  
(949) 824-2039 fax

November 27, 2012

Dear Joey,

I want to acknowledge the wonderful work of Inclusion Films in the upcoming documentary *Through the Heart of Tango* and in the *Integrated Competitive Employment Project*, a marketing video supporting workforce development of persons with intellectual and developmental disabilities in Orange County. As a stakeholder and as the executive producer of these projects, I am very pleased with Producer Bill Dion and Director Ray Martino at the helm of each day to day activity on these projects with their crew. The staff was professional both in front and behind the cameras, which made me feel that the projects were always in good hands. I am also delighted that Inclusion Films is included in our list of our practicum sites where our Public Health students can train and get field experience in real work situations.

Inclusion Films indeed provides a wonderful public service to the community in its mission. There is no substitute for creativity and work that comes from the heart. It makes every project and collaboration something simply special!

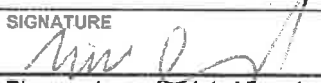
A handwritten signature in cursive script that reads "Liza B. Krassner".

Liza B. Krassner  
Chief Administrative Officer and  
Director, Student Services  
lbkrassn@uci.edu



**Attachment 5**  
**Payee Data Record**

STD, 204 (Rev. 6-2003)

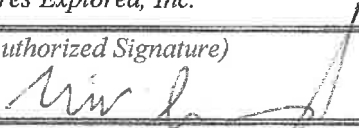
1	<b>INSTRUCTIONS:</b> Complete all information on this form. Sign, date, and return to the State agency (department/office) address shown at the bottom of this page. Prompt return of this fully completed form will prevent delays when processing payments. Information provided in this form will be used by State agencies to prepare Information Returns (1099). See reverse side for more information and Privacy Statement. <b>NOTE:</b> Governmental entities, federal, State, and local (including school districts), are not required to submit this form.		
2	<b>PAYEE'S LEGAL BUSINESS NAME</b> (Type or Print) Futures Explored, Inc. <b>SOLE PROPRIETOR - ENTER NAME AS SHOWN ON SSN</b> (Last, First, M.I.) <b>E-MAIL ADDRESS</b> willsanford@futures-explored.org <b>MAILING ADDRESS</b> 3547 Wilkinson Lane <b>BUSINESS ADDRESS</b> same <b>CITY, STATE, ZIP CODE</b> Lafayette, CA 94549 <b>CITY, STATE, ZIP CODE</b> same		
3	<b>PAYEE ENTITY TYPE</b>  <b>CHECK ONE BOX ONLY</b>  <input type="checkbox"/> <b>PARTNERSHIP</b> <input type="checkbox"/> <b>ESTATE OR TRUST</b> <input type="checkbox"/> <b>INDIVIDUAL OR SOLE PROPRIETOR</b> <b>ENTER SOCIAL SECURITY NUMBER:</b> _____-_____-_____ <small>(SSN required by authority of California Revenue and Tax Code Section 18646)</small> <input type="checkbox"/> <b>CORPORATION:</b> <input type="checkbox"/> <b>MEDICAL</b> (e.g., dentistry, psychotherapy, chiropractic, etc.) <input type="checkbox"/> <b>LEGAL</b> (e.g., attorney services) <input checked="" type="checkbox"/> <b>EXEMPT</b> (nonprofit) <input type="checkbox"/> <b>ALL OTHERS</b>		<b>NOTE:</b> Payment will not be processed without an accompanying taxpayer I.D. number.
4	<b>PAYEE RESIDENCY STATUS</b> <input checked="" type="checkbox"/> California resident - Qualified to do business in California or maintains a permanent place of business in California. <input type="checkbox"/> California nonresident (see reverse side) - Payments to nonresidents for services may be subject to State income tax withholding. <input type="checkbox"/> No services performed in California. <input type="checkbox"/> Copy of Franchise Tax Board waiver of State withholding attached.		
5	<b>I hereby certify under penalty of perjury that the information provided on this document is true and correct.</b> <b>Should my residency status change, I will promptly notify the State agency below.</b> <b>AUTHORIZED PAYEE REPRESENTATIVE'S NAME</b> (Type or Print) Will Sanford <b>TITLE</b> Executive Director <b>SIGNATURE</b>  <b>DATE</b> 04/26/2013 <b>TELEPHONE</b> (925) 284-3240		
6	<b>Please return completed form to:</b> <b>Department/Office:</b> _____ <b>Unit/Section:</b> _____ <b>Mailing Address:</b> _____ <b>City/State/Zip:</b> _____ <b>Telephone:</b> (____) _____ <b>Fax:</b> (____) _____ <b>E-mail Address:</b> _____		

**Attachment 6**  
**Contractor Certification Clauses (CCC)**

CCC-307

**CERTIFICATION**

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

<i>Contractor/Bidder Firm Name (Printed)</i> Futures Explored, Inc.		<i>Federal ID Number</i> 94-1567161
<i>By (Authorized Signature)</i> 		
<i>Printed Name and Title of Person Signing</i> Will Sanford, Executive Director		
<i>Date Executed</i> 4/26/2013		<i>Executed in the County of</i> Contra Costa County

**CONTRACTOR CERTIFICATION CLAUSES**

1. **STATEMENT OF COMPLIANCE:** Contractor has, unless exempted, complied with the nondiscrimination program requirements. (Gov. Code §12990 (a-f) and CCR, Title 2, Section 8103) (Not applicable to public entities.)

2. **DRUG-FREE WORKPLACE REQUIREMENTS:** Contractor will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.

b. Establish a Drug-Free Awareness Program to inform employees about:

- 1) the dangers of drug abuse in the workplace;
- 2) the person's or organization's policy of maintaining a drug-free workplace;
- 3) any available counseling, rehabilitation and employee assistance programs; and,
- 4) penalties that may be imposed upon employees for drug abuse violations.

c. Every employee who works on the proposed Agreement will:

- 1) receive a copy of the company's drug-free workplace policy statement; and,
- 2) agree to abide by the terms of the company's statement as a condition of employment on the Agreement.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both and Contractor may be ineligible for award of any future State agreements if the department determines that any of the following has occurred: the Contractor has made false certification, or violated the

certification by failing to carry out the requirements as noted above. (Gov. Code §8350 et seq.)

3. NATIONAL LABOR RELATIONS BOARD CERTIFICATION: Contractor certifies that no more than one (1) final unappealable finding of contempt of court by a Federal court has been issued against Contractor within the immediately preceding two-year period because of Contractor's failure to comply with an order of a Federal court, which orders Contractor to comply with an order of the National Labor Relations Board. (Pub. Contract Code §10296) (Not applicable to public entities.)

4. CONTRACTS FOR LEGAL SERVICES \$50,000 OR MORE- PRO BONO REQUIREMENT: Contractor hereby certifies that contractor will comply with the requirements of Section 6072 of the Business and Professions Code, effective January 1, 2003.

Contractor agrees to make a good faith effort to provide a minimum number of hours of pro bono legal services during each year of the contract equal to the lessor of 30 multiplied by the number of full time attorneys in the firm's offices in the State, with the number of hours prorated on an actual day basis for any contract period of less than a full year or 10% of its contract with the State.

Failure to make a good faith effort may be cause for non-renewal of a state contract for legal services, and may be taken into account when determining the award of future contracts with the State for legal services.

5. EXPATRIATE CORPORATIONS: Contractor hereby declares that it is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code Section 10286 and 10286.1, and is eligible to contract with the State of California.

6. SWEATFREE CODE OF CONDUCT:

a. All Contractors contracting for the procurement or laundering of apparel, garments or corresponding accessories, or the procurement of equipment, materials, or supplies, other than procurement related to a public works contract, declare under penalty of perjury that no apparel, garments or corresponding accessories, equipment, materials, or supplies furnished to the state pursuant to the contract have been laundered or produced in whole or in part by sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor, or with the benefit of sweatshop labor, forced labor, convict labor, indentured labor under penal sanction, abusive forms of child labor or exploitation of children in sweatshop labor. The contractor further declares under penalty of perjury that they adhere to the Sweatfree Code of Conduct as set forth on the California Department of Industrial Relations website located at [www.dir.ca.gov](http://www.dir.ca.gov), and Public Contract Code Section 6108.

b. The contractor agrees to cooperate fully in providing reasonable access to the contractor's records, documents, agents or employees, or premises if reasonably required by authorized officials of the contracting agency, the Department of Industrial Relations,

or the Department of Justice to determine the contractor's compliance with the requirements under paragraph (a).

7. DOMESTIC PARTNERS: For contracts over \$100,000 executed or amended after January 1, 2007, the contractor certifies that contractor is in compliance with Public Contract Code section 10295.3.

### **DOING BUSINESS WITH THE STATE OF CALIFORNIA**

The following laws apply to persons or entities doing business with the State of California.

1. CONFLICT OF INTEREST: Contractor needs to be aware of the following provisions regarding current or former state employees. If Contractor has any questions on the status of any person rendering services or involved with the Agreement, the awarding agency must be contacted immediately for clarification.

Current State Employees (Pub. Contract Code §10410):

- 1). No officer or employee shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest and which is sponsored or funded by any state agency, unless the employment, activity or enterprise is required as a condition of regular state employment.
- 2). No officer or employee shall contract on his or her own behalf as an independent contractor with any state agency to provide goods or services.

Former State Employees (Pub. Contract Code §10411):

- 1). For the two-year period from the date he or she left state employment, no former state officer or employee may enter into a contract in which he or she engaged in any of the negotiations, transactions, planning, arrangements or any part of the decision-making process relevant to the contract while employed in any capacity by any state agency.
- 2). For the twelve-month period from the date he or she left state employment, no former state officer or employee may enter into a contract with any state agency if he or she was employed by that state agency in a policy-making position in the same general subject area as the proposed contract within the 12-month period prior to his or her leaving state service.

If Contractor violates any provisions of above paragraphs, such action by Contractor shall render this Agreement void. (Pub. Contract Code §10420)

Members of boards and commissions are exempt from this section if they do not receive payment other than payment of each meeting of the board or commission, payment for preparatory time and payment for per diem. (Pub. Contract Code §10430 (e))

2. LABOR CODE/WORKERS' COMPENSATION: Contractor needs to be aware of the provisions which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions, and Contractor affirms to comply with such provisions before commencing the performance of the work of this Agreement. (Labor Code Section 3700)

3. AMERICANS WITH DISABILITIES ACT: Contractor assures the State that it complies with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to the ADA. (42 U.S.C. 12101 et seq.)

4. CONTRACTOR NAME CHANGE: An amendment is required to change the Contractor's name as listed on this Agreement. Upon receipt of legal documentation of the name change the State will process the amendment. Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.

5. CORPORATE QUALIFICATIONS TO DO BUSINESS IN CALIFORNIA:

a. When agreements are to be performed in the state by corporations, the contracting agencies will be verifying that the contractor is currently qualified to do business in California in order to ensure that all obligations due to the state are fulfilled.

b. "Doing business" is defined in R&TC Section 23101 as actively engaging in any transaction for the purpose of financial or pecuniary gain or profit. Although there are some statutory exceptions to taxation, rarely will a corporate contractor performing within the state not be subject to the franchise tax.

c. Both domestic and foreign corporations (those incorporated outside of California) must be in good standing in order to be qualified to do business in California. Agencies will determine whether a corporation is in good standing by calling the Office of the Secretary of State.

6. RESOLUTION: A county, city, district, or other local public body must provide the State with a copy of a resolution, order, motion, or ordinance of the local governing body which by law has authority to enter into an agreement, authorizing execution of the agreement.

7. AIR OR WATER POLLUTION VIOLATION: Under the State laws, the Contractor shall not be: (1) in violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district; (2) subject to cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or (3) finally determined to be in violation of provisions of federal law relating to air or water pollution.

8. PAYEE DATA RECORD FORM STD. 204: This form must be completed by all contractors that are not another state agency or other governmental entity.

**Attachment 7**

**Lead Staff/Consultant Resumes**



## Kiara Hedglin

3/23/2013



3 Winnifred Ct., Antioch CA 94509  
(480)889-4542  
Caangel389@yahoo.com  
www.facebook.com/Seedadvocacy

### OBJECTIVES

To begin a career helping people with developmental disabilities find their voice through advocacy and activism!

### EDUCATION

Currently Enrolled  
Studying Human Development

1/2009 – 6/2011  
Studied Liberal Arts  
Studied Early Childhood Development (ECE)

2003 - 2007  
General Education  
Electives in Performing Arts  
Participant in 2006 Youth Leadership Forum

### EXPERIENCE

**Lead Advocacy Consultant**  
11/2011 - Current  
Developed & Delivered a Wide Variety of Trainings  
Hosted Events, Rallies, and Protests  
Maintained Company Facebook  
Maintain Project Branding

### SKILLS

- ☐ Action Driven
- ☐ Tech Savvy
- ☐ Expertise in Legislative Outreach

**References Available Upon Request**

#### ACHIEVEMENTS

MC & Planning Team Member of the Failing Freedom Rally  
MC of 2013 East Bay Legislative Coalition (EBLC) Town Hall  
Presenter: How to Promote Grassroots Advocacy  
MC & Planning Team Member – Hope for the Holidays Rally  
Keynote Presenter at 2011 Senate Hearing on the Lanterman Act  
Presenter – People First Conference (Multiple Years)

#### AWARDS

Carlos Quintong Award Recipient (2012, 2011)  
Certificate of Recognition – Senator Mark DeSaulnier

**Joey Travolta**



**Producer & Director**

Joey Travolta has been drawing extensive media attention for helping kids and adults with neurodevelopment disabilities. As a former special education teacher, blended with his vast experience over the years in the film industry, Joey has made it his mission to combine his two passions.

From September 2005 to the present, Mr. Travolta has served as the owner and director of Inclusion Films, a production company and vocational film workshop. Since July 2006, he has served as the director and owner of Little Documentary Films, LLC, a company which organizes and manages film camps for children with autism. Born into a show business family, Mr. Travolta originally entered the entertainment industry in 1978 as a recording artist with Casablanca Records, showcasing his music performances on variety shows such as American Band Stand and the Donny & Marie Show. Joey made his acting debut by starring in feature films like SUNNYSIDE, BEVERLY HILLS COP III, and OSCAR, followed by his theatre performances in WEST SIDE STORY, BYE BYE BIRDIE, and GUYS AND DOLLS. As an actor, Joey steadily appeared in television

**In the early nineties, Joey made writing, directing and producing his focus.** Joey's directorial debut was, **HARD VICE A/K/A VEGAS VICE**, followed by the critically acclaimed, **ENEMIES OF LAUGHTER** starring Peter Falk in 2000, and the comedy, **PARTNERS**. In 2005, while still keeping within Hollywood's fold as the director of the Sci-Fi, **FINAL MOVE**, Joey served as producer in the documentary, **NORMAL PEOPLE SCARE ME** while mentoring a fifteen-year-old autistic boy who directed this film. Coming full circle and merging his film experience with his passion for teaching, Joey currently develops film workshops and camps for kids and adults that inspire and educate students about filmmaking.

---

***Eric Zigman***  
*Zigma Consulting*  
310 Locust Street, Suite F  
Santa Cruz, CA 95060  
(831) 426-0370 (office)  
zigma@cruzio.com

**Objective** To use my skills and experiences in governance, organizational leadership, management and program development in a creative work environment to empower my fellow citizens with developmental disabilities and, thereby, strengthen our communities.

**Consulting Experience** **Zigma Consulting (2004 – present)**  
**Santa Cruz, CA 95060**

**Summary:** For the past nine years, I have been primarily contracted to do work on demonstration projects, including over five years directing the Bay Area Quality Management System, a progressive quality improvement and enhancement project of the three Bay Area Regional Centers as part of the Closure of Agnews Developmental Center.

Of the dozens of projects I have worked on as a consultant, many have dealt with program and organizational development, including the founding of Alegria Community Living Services. At Alegria, my role was to facilitate the creation of the agency, including gaining incorporation and nonprofit status, recruiting an initial Board of Directors, drafting Bylaws, hiring an Executive Director, and creating initial organizational structures, services, budgets and agency marketing information. I was also the Interim Executive Director of Alegria for a short time.

Other projects include strategic planning and investment, measuring impact of services, a proposal to create a Masters In Management and Disability degree, an economic impact study, services to individuals with Autism, a feasibility study for a Community Center hosted by individuals with developmental disabilities and a nonprofit collaboration project. In addition, I have worked on draft legislation to consolidate and improve Quality Assurance systems in adult services.

**Previous Employment Experience** **Hope Services and Skills Center, Inc. (1989 – 2004)**  
**Santa Clara and Santa Cruz Counties**

**Summary:** I held eight positions of increasing responsibility over fifteen years culminating in the “District Director” position at Skills Center and Hope Services (the two agencies completed a merger in 2003). From 1998 - 2002, I was responsible for the leadership, management and operations of all aspects of Skills Center, Inc (Santa Cruz and Monterey Counties). I oversaw annual operating budget of \$6.2 million and daily operations of services to 12 programs, eight sites, 110 staff members and 460 people with developmental disabilities.

In other roles at Hope Services, I directed efforts in government relations (i.e. legislative issues, state funding proposals, advocacy efforts on behalf of clientele); I met with many state legislators and their staff on issues regarding service delivery and developmental disability; and, updated staff and Boards of Director on relevant legislative issues. I also had duties relative to staff training and development at Hope and created plan to improve opportunities for staff.

I researched, authored and implemented Workability III contract with Cabrillo College and Department of Rehabilitation, the first collaborative program of its kind for individuals with developmental disabilities in the state as well as researched and Co-authored \$175,000 start-up grant to bring innovative Senior Services for individuals with developmental disabilities to Santa Cruz County.

In addition, during my time at Skills Center and Hope, I:

- ~ Directly supervised a team of ten senior managers (programmatic and administrative) and sales people.
- ~ Was the executive in charge of monthly Board of Directors meetings, including briefings to board, agenda development, facilitation and minutes.
- ~ Oversaw all aspects of financial management, e.g., annual budgeting process, state funding increases, monthly financial statement review and operational adjustments.
- ~ Marshaled organization through three triennial cycles of accreditation from the Commission on the Accreditation of Rehabilitation Facilities (awarded highest level of accreditation after each survey).
- ~ Managed Sheltered Workshop, Community Employment, Supported and Independent Living programs. Responsible for quality of services, efficiency, staff hiring, training and development, client and funder satisfaction.
- ~ Directly managed cases of 110 adults with developmental disabilities enrolled in vocational programs. Held interdisciplinary team meetings, established and monitored goals, wages, behavioral improvements, etc. Acted as liaison to families, funders, social workers and other agencies.
- ~ For four years I had the pleasure of working as a direct service staff supporting individuals with developmental disabilities in a variety of settings.

## **Education**

**Executive Masters in Rehabilitation Administration (May 1997)**  
**McClaren School of Business, University of San Francisco**  
**San Francisco, California**

- ~ Awarded Keith Gardner Memorial Award, Beta Gamma Sigma Honors Society.
- ~ I was also employed by USF as a Distance Learning Advisor and Guest Lecturer in the program after I graduated.

**Bachelor of Arts, Psychology and Literature (December 1983)**  
**University of California, Santa Cruz**  
**Santa Cruz, California**

- ~ Honors in the Major; College Honors.





DRAFT COPY

**Program Development Grant  
Request for Proposal  
Application and Instructions  
Federal Fiscal Year 2014  
Cycle 36**

**Deadline:  
July 25, 2013**

**No faxes or emails will be accepted**

**The application packet is available at:  
[www.scdd.ca.gov](http://www.scdd.ca.gov)**

**If you would like to have a hard copy mailed to you or if you have any  
questions regarding the grant process:**

**Please call (209) 473-6930**

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## **A. INTRODUCTION**

The California State Council on Developmental Disabilities (SCDD), administers grants to community-based organizations to fund new and innovative projects. All projects are required to address one or more of the goals and objectives in the California State Plan on Developmental Disabilities (State Plan) and improve and enhance services for Californians with developmental disabilities and their families. Program Development Grants (PDG) provide funding for new approaches to addressing the needs of Californians with developmental disabilities that are part of an overall strategy for systemic change. Each area board selects one or more specific goals and/or objectives from the State Plan and seeks proposals that contribute to the implementation of the Plan.

Pursuant to the Developmental Disabilities Assistance and Bill of Rights Act (Public Law 106-402), SCDD has allocated \$10,000 per area board for local projects to be awarded in Cycle 36.

### **1. Federal and State Law**

The SCDD is a California state agency established by federal and state law. Pursuant to the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (Public Law 106-402), SCDD is to develop and implement a State Plan to support advocacy, capacity building, and systemic change activities that are consistent with promoting a consumer and family-based system of services and supports. The goal of the federal law is to enable individuals with developmental disabilities to achieve self-determination, independence, productivity, and community integration and inclusion.

The Lanterman Developmental Disabilities Services Act (Welfare and Institutions Code, section 4540 et seq) directs SCDD to conduct activities related to meeting the objectives of the Plan, including activities to demonstrate new approaches to serving individuals with developmental disabilities and their families that are part of an overall strategy for systemic change.

### **2. Program Development Grant (PDG)**

The PDG is one vehicle used by the Council to meet both the federal and state mandates. PDG projects are the primary method of providing resources to initiate new and innovative services and supports for Californians with developmental disabilities and their families.

Grants are awarded on a federal fiscal year cycle, consistent with the goals and objectives outlined in the SCDD State Plan. While the grants provide for immediate funding leading to the creation or expansion of services, applicants are expected to secure ongoing funding for sustainability of the work proposed.

Grants awarded through this Request for Proposal (RFP) will be administered through the Council's local area board offices. During the PDG process, the area board is to: (1) ensure that all proposals are fairly and consistently reviewed and evaluated; (2) comply with State and Federal laws and policies; (3) provide assistance to applicants; and (4) recommend awarding grants to the highest ranked proposal(s) based on available funding.

## **B. THE SCDD STATE PLAN (STATE PLAN)**

The State Plan defines critical, current, and emerging issues facing Californians with developmental disabilities and their families. The State Plan is developed with extensive community input from stakeholders throughout California. The State Plan also provides information to the Federal Administration on Developmental Disabilities on how the Council will invest its resources. The State Plan can be accessed on the SCDD web site: <http://www.scdd.ca.gov/stateplan.htm>

## **C. PDG APPLICATION REQUIREMENTS AND TIMELINE**

1. Proposals must include measurable identifiable outcomes.
2. The application must be complete and meet all of the requirements set forth in this Request for Proposal.
2. Applicants are responsible for providing accurate, current, and complete information about their organization and proposed project.
3. The final decision regarding selection of proposals to be funded is the responsibility of the State Council on Developmental Disabilities.
4. Timelines

Application Deadline	July 25, 2013
Public Notice of Selection of Awardee	September 19, 2013
Protest Period	September 19-29, 2013
*Award Notification	September 30, 2013
Anticipated Funding of Approved Proposals	November 1, 2013
Completion of Project	September 30, 2014

*\*Pending successful completion of the protest period*
5. Any proposals received after **July 25, 2013** regardless of the postmarked date will be returned to the applicant.
6. The area board will not accept faxed or e-mailed documents pertaining to the application process.
7. A complete application, including all the required documentation must be received by 5:00 p.m. on July 25, 2013 at:  

**Area Board Office- TBD**
8. Prior to posting the "Notice of Intent to Award Contracts" and during the protest period all proposals will be designated confidential.

After the protest period ends, all proposals received are a matter public record.

**D. FUNDING OF PROJECTS**

1. Funding of projects is contingent on receipt of federal funds. After the announcement of a grant award, changes in the level of federal allocation to California could result in the reduction of funds or withdrawal of some or all funded proposals.
2. The Council assumes no responsibility for costs incurred by the applicant for the development or submission of a proposal.
3. The Council may reduce the level of funding requested in a proposal. If the requested amount is proposed to be reduced, the applicant will be asked if they want to proceed with the process. If the applicant wishes to proceed, a revised budget will be required to be submitted with the revised funding request.
4. Successful applicants will submit all invoices in arrears. Applicants must be financially capable of supporting the project until such time as invoices are submitted and reimbursement is received.
5. Invoices must include receipts for each expense claimed; this includes but is not limited to records of salaries paid. Reimbursement of expenses will only be made for expenses associated with a line item of the approved budget.

**E. CONTENT OF APPLICATION PACKAGE**

**Proposals for AB VI**

**Must address the following Goals and/or Objectives of the State Plan**

- Goal # .....
- Goal # .....
- Goal # .....

Proposals must be submitted in accordance with these instructions, using the application forms available on your area board's webpage located at [www.scdd.ca.gov](http://www.scdd.ca.gov) or utilize the hard copies attached to these instructions.

**Completed applications must include the following elements:**

1. **Cover Letter** – The cover letter to the proposal must include:
  - a. A one paragraph description of the project

- b. Assurance that the applicant is financially capable of supporting the project until such time as the invoices are submitted and reimbursement is received.
- c. The applicant must indicate the following: "We have carefully read and understand all the provisions in this RFP and agree to be bound by them. We fully read and reviewed the terms and conditions as stated in the State Contracting Requirements, attached to the RFP, and, that by submitting a response understands that this document represents the agreement that we will be expected to execute if we are successfully awarded a Cycle 35 CPDG from the SCDD." No deviations or exceptions to this statement shall be accepted or permitted.

## **2. Project Data Sheet (Form available online and attached to this RFP)**

### **#1. Applicant Information**

- Project Number -Leave blank (assigned by area board)
- Project Name- Provide a short descriptive name for the proposed project (55 character limit)
- Organization Name- Applicant's legal name
- Organization Website - If applicable, provide the applicant's website address
- Organization Address - Street and floor or suite number
- Organization City/State - City and State
- Organization Zip Code - five or nine digit zip code
- Taxpayer ID Number- Provide taxpayer identification number (TIN)
- Project Period- Month/Day/Year. Use numbers. (i.e., XX/XX/XXXX)

### **#2. Project Information**

- Type of Applicant-Select the type of applicant from the pull down menu (i.e., Non-profit, School District, County, etc.) Select only one. Partnerships/collaborations must choose one organization as the primary applicant.
- Type of Project- Leave blank (Assigned by area board)

**#3. Project Funding-** The "total project costs" must equal the total of "SCDD grant funds" plus "applicant matching funds." The federal government is requiring matching funds on all grants awarded by the Council/area board. A match of 25% is required for Non-Poverty areas and a 10% match is required for services that will be provided in poverty areas. The match may be in-kind funding.

- Grant Type- Select Poverty or Non-Poverty from the pull down menu. The U.S. Census Bureau provides information on the percent of persons in poverty by state and county. Go to [www.census.gov/](http://www.census.gov/). In the "People" section, click on "Poverty". Click on "Small Area Income and Poverty Estimates" to access the state and county data.

**#4. Contact Information-** List the appropriate individuals with whom the area board will communicate for the indicated purposes. Use the check box to auto-fill repetitive

information for a contact. The auto-fill information can be over written if necessary (i.e. email addresses).

**#5. Signatory Authority-** Identify the organization Director (CEO or equivalent) who can legally enter into a contractual agreement on behalf of the applicant.

### **3. Project Narrative (Form available online and attached to this RFP)**

The proposal must include a project narrative that includes the following sections and contents as described below. Do not exceed eight (8) pages.

**a. Abstract** - Provide a one paragraph abstract that clearly states the project goal, the major activities of the project and the impact it will have on people with developmental disabilities.

#### **b. Qualifications**

- Describe your organization's qualifications to implement the proposed project, including your experience working with people with developmental disabilities.
- Identify any organizations that will be collaborating on the project, and provide a brief description of their respective roles.

#### **c. Methodology**

- Provide a detailed narrative about the project, including information on the methodology to be used and an overview of project activities.
- Explain how the proposed project is consistent with the Council's mission.
- State who the target population is and why it is being targeted.
- If applicable, describe how the project benefits individuals from underserved communities and addresses cultural diversity.
- Specify if the project targets individuals in a federally identified poverty area(s).
- Describe the role of people with developmental disabilities in the project.
- Provide a brief description of project functions for each staff and any subcontractors identified for the project.

#### **d. Outcomes & Evaluation**

- Describe the major expected outcomes of the project, and how successful completion of the project will impact people with developmental disabilities.
- Describe how you will evaluate the outcomes of the project
- Specify the expected number of people to be served by this project by the following categories:
  - Number of individuals with a developmental disability
  - Number of family members
  - Number of other individuals
- Describe how activities will continue after the grant is completed.

**4. Budget Detail Worksheet (Form available online and attached to this RFP)**

Develop a line item budget for the project, using the Budget Detail Worksheet included in this RFP. Include the names or position titles for each staff person to be paid from the project budget, as identified on the Organization Chart (see Item 5.b. below). Specify the total project costs for each line item,,, description of expenses, and the expense charged to SCDD/area board funds. Grant recipients are not required to provide a non-federal match, but they are encouraged to do so. If your organization is providing a match, identify the expenses under the Matching Funds column and identify the source of those funds.

**5. The Following Attachments Are Required:**

- a. **Continuation of funding letter(s)** or verification. When possible, include a letter documenting the availability of funding for continuation of the project after the period of the grant.
- b. **Organizational Chart** - Provide an organizational chart for the proposal proposed project only, including sub-contractors where applicable. The organization chart must include a list of the names and position titles of the personnel staff and sub-contractors listed on the Budget Worksheet. The organizational chart does not need to include the entire agency or institution.
- c. **Personnel Information** - For each staff person employed by the project, including those identified on the Budget Detail Worksheet, provide Curricula Vitae/Resume, Duty Statement, and any applicable current Licenses and Credentials. If staff has not been hired, provide position descriptions.
- d. **Previous Grants/Awards** – List all grants/awards received from any entity during the last two years that benefit individuals with developmental disabilities. Include the name of the project, the funding source, contact person, telephone number, and the amount of the grant/award.
- e. **Payee Data Record** (Form available online and attached to this RFP)
- f. **Three (3) Letters of Support.** A minimum of three letters of support from three different entities is required. Applicants are urged to obtain letters of support from any collaborators that will be working on the project. Each letter must include the company/individual's name, address and contact person with the telephone number. At least one letter of support must be from an entity with recognized expertise in the area identified in the proposal. The letters should address (1) familiarity with the applicant and (2) the need for services outlined in the proposal.

Letters of support received from entities and/or individuals that will financially benefit from the funding of this project will not be counted toward the required three letters of support. Council members, including state department appointees and employees of the Council or area board are ineligible to write letters of support.

**g. Proposal Checklist** (Form available online and attached to this RFP)

Applicants must complete the attached Proposal Checklist to help ensure that all required items are included.

**F. ESSENTIAL CRITERIA FOR ALL PROPOSALS**

- a. Proposals submitted must meet one or more of the State Plan goals and/or objectives identified by the area board in this RFP.
- b. Proposals submitted must serve individuals who meet the federal and state definition of developmental disabilities.
- c. Proposals submitted must be consistent with all applicable federal, state, and local government laws and regulations.
- d. Proposals must be complete, including all required attachments.

**G. PROPOSAL EVALUATION AND SELECTION PROCESS**

**1. Overall Proposal Evaluation**

Each eligible proposal will be scored as follows. A maximum of 100 points may be awarded by each member of the Area Board Grant Committee.

**2. Criteria for Proposal Evaluation**

- 25 pts –The extent to which the proposal advances the state plan's goals and/or objectives. Measurable outcomes are identified and clearly defined.
- 25 pts - The proposal describes the types of services/supports to be provided, using sound methodology that can achieve the outcomes identified in the proposal.
- 10 pts - The applicant demonstrates the experience, knowledge, and ability to accomplish what is being proposed.
- 15 pts - The proposed budget is reasonable and appropriate for accomplishing the identified program objectives and for reaching the target audience(s).
- 15 pts - The proposal includes an appropriate method to determine if the project achieves the outcomes identified in the proposal..
- 10 pts - The proposal outlines how it will address/impact underserved communities and cultural diversity. The target audience(s) is clearly delineated and is appropriate to the proposal.



## **H. ALLOWABLE AND NON-ALLOWABLE PDG GRANT COSTS**

The purpose of the PDG program is to provide resources necessary to initiate new services/supports that are creative, needed and innovative for people with developmental disabilities and their families. These funds may not be used to purchase goods or services for which another funding source is available, or to supplant existing funding. Proposal budgets should include all necessary expenses for the applicant to complete their project.

Each line item in the budget will be reviewed to determine whether it is allowable and reasonable. The Council reserves the right to request a revised budget. The following list contains examples of allowable and non-allowable PDG contract expenditures.

1. Funds cannot be used to purchase real property.
2. Funds cannot be used to purchase childcare vouchers.
3. Funds may be used to modify facilities to meet fire and life safety requirements of the fire marshal and/or the licensing agency. The applicant will be required to submit three bids for any facility
4. Rent for an office and/or facility is a reimbursable expense, as long as staff funded through the grant is working at or from the office/facility. The rent should not exceed the rental rates for an equivalent size facility in the geographical area.
5. Equipment may be leased; however, it may not be leased with an option to purchase. The contractor shall provide area board with copies of agreements for equipment leased during the contract period.
6. Examples of equipment that may not be purchased or purchased only with prior approval include:
  - a. Motor vehicles may not be purchased.
  - b. Computers may only be purchased with prior approval from the area board.
  - c. Copy machines may not be purchased. However, they may be leased during the contract period.
  - d. Any equipment item that is attached to a facility or vehicle, which cannot be removed in usable condition from the facility or vehicle.

As a general rule, it can be assumed that equipment with a value under \$500 will be amortized and no longer property of the State after three years. For purposes of PDG, equipment item costs must be considered in terms of the end usable product, e.g., a bed is considered the sum of the cost of the mattress, box springs and frame. Applicants should contact the area board concerning items over \$500. All equipment will



- be inventoried and be issued a state identification tag identifying each as the property of the State until such time as it is released by the State.
7. Funds cannot be used for modifications that are solely aesthetic in nature or are not necessary to meet fire and life safety requirements.
  8. Any reimbursement for necessary travel expenses and per diem shall be at rates set in accordance with allowable state guidelines and per diem and mileage rates. Travel outside the State of California shall not be reimbursed.
  9. Funds shall not be used to purchase food for participants at PDG sponsored conferences, trainings, seminars or workshops.
  10. Costs related to disseminating information about project outcomes can only be included in the funding request if this expense is to be incurred during the term of the contract period.
  11. No staff person can be committed to more than 100% of that person's time. The area board reserves the right to verify and determine reasonableness of staff time committed to other jobs/projects.
  12. Funds may be used to secure insurance coverage that to assure that prior to the contract approval, Contractor, other than a self-insured public entity, can furnish to the area board Certificate(s) of Insurance stating that there is liability insurance presently in effect covering all of Contractor's activities under this contract as appropriate of not less than \$500,000 per occurrence.

**I. NOTICE of INTENT TO AWARD CONTRACTS AND PROTESTS**

Each Area Board's recommendations for grant awards will be presented to the Program Development Committee (PDC) for consideration at its September meeting. A final decision to award contracts will be made by the State Council on Developmental Disabilities (SCDD) at its September 18, 2013 meeting.

A written protest may be filed with the Chairperson of the SCDD during the period September 19-29, 2013. The protest letter must be received at the SCDD office before 5:00 p.m. on September 29, 2013.

The written protest must outline specifically what the applicant is protesting and why the protest is being filed. Protests are limited to those instances where the area board did not follow the guidelines for accepting and evaluating the proposal. The decision of the SCDD Chairperson shall be final.

Pending successful completing of the protest period, a "Notice of Intent to Award Contract" will be posted September 30, 2013 at [www.scdd.ca.gov](http://www.scdd.ca.gov) and at the local area board office.

# Proposal Checklist

## Program Development Grant Request for Proposal Federal Fiscal Year 2014 - Cycle 36

In completing this form, the proposer acknowledges that the following items are Included in the proposal, in accordance with the instructions provided in the RFP. This checklist should be included with the proposal package.

Check box below to indicate inclusion in proposal

- ☐ Cover Letter
- ☐ Project Data Sheet
- ☐ Project Narrative (not to exceed 8 pages)
- ☐ Budget Detail Worksheet (including description of identified expenses)
- ☐ Continuation of Funding Letter, if applicable.
- ☐ Organization Chart
- ☐ Curricula Vitae/Resumes and position descriptions, as applicable
- ☐ List of Previous Grants/Awards
- ☐ Payee Data Record Form
- ☐ (3) Letters of Support
- ☐ Proposal Checklist

## **Instructions for Completing Individual Application Forms**

### **Instructions for Project Data Sheet**

*If the form is closed without all the required fields completed an error warning will alert you that certain fields need to be completed. The form can be saved and closed and re-opened at a later period to complete the required information.*

#### **1. Applicant Information**

- Project Number – Leave blank (assigned by area board)
- Project Name – Provide a short descriptive name for the proposed project (55 character limit)
- Organization Name – Applicant's legal name
- Organization Website – If applicable, provide the applicant's website address
- Organization Address – Street and floor or suite number
- Organization City/State – City and State
- Organization Zip Code – five or nine digit zip code
- Taxpayer ID Number – Provide taxpayer identification number (TIN)
- Project Period – Month/Day/Year. Use numbers. (i.e., XX/XX/XXXX)

#### **2. Project Information**

- Type of Applicant – Select the type of applicant from the pull down menu (i.e., Non-profit, School District, County, etc.) Select only one. *Partnerships/collaborations must choose one organization as the primary applicant.*
- Type of Project – Leave blank (Assigned by area board)

#### **3. Project Funding** – The “total project costs” must equal the total of “SCDD grant funds” plus “applicant matching funds.” The federal government is requiring matching funds on all grants awarded by the Council/area board. A match of 25% is required for Non-Poverty areas and a 10% match is required for services that will be provided in poverty areas. The match may be in-kind funding.

- Grant Type – Select Poverty or Non-Poverty from the pull down menu. The U.S. Census Bureau provides information on the percent of persons in poverty by state and county. Go to [www.census.gov/](http://www.census.gov/). In the “People” section, click on “Poverty”. Click on “Small Area Income and Poverty Estimates” to access the state and county data.

#### **4. Contact Information** – List the appropriate individuals with whom the area board will communicate for the indicated purposes. Use the check box to auto-fill repetitive information for a contact. The auto-fill information can be over written if necessary (i.e. email addresses).

#### **5. Signatory Authority** – Identify the organization Director (CEO or equivalent) who can legally enter into a contractual agreement on behalf of the applicant.

## **Instructions for Project Narrative**

Applicants will provide the narrative description of their proposed projects using the Project Narrative outline. Respond to all the components as indicated. Do not exceed eight (8) pages.

### **1. Abstract**

- Provide a one paragraph abstract that clearly states the project goal, the major activities of the project and the impact it will have on people with developmental disabilities.

### **2. Qualifications**

- Describe your organization's qualifications to implement the proposed project, including your experience working with people with developmental disabilities.
- Identify any organizations that will be collaborating on the project, and provide a brief description of their role.

### **3. Methodology**

- Provide a detailed narrative about the project, including information on the methodology to be used and an overview of project activities.
- Explain how the proposed project is consistent with the Council's mission.
- State who the target population is and why it is being targeted.
- Specify if the project targets individuals in a federally identified poverty area(s).
- Describe the role of people with developmental disabilities in the project.
- Provide a brief description of project functions for each staff and any subcontractors identified for the project.

### **4. Outcomes & Evaluation**

- Describe the major expected outcomes of the project, and how successful completion of the project will impact people with developmental disabilities.
- Describe how you will evaluate the outcomes of the project
- Specify the expected number of people to be served by this project by the following categories:
  - Number of individuals with a developmental disability
  - Number of family members
  - Number of other individuals
- Describe how activities will continue after the project is completed.

### **Instructions for Project Budget Plan**

Develop a line item budget for the project. For each itemized category, specify the total project costs, description of expense, and the expense charged to SCDD/area board funds. A line item expense under a category must include a description of the line item expense. Grant recipients are not required to provide a non-federal match, but they are encouraged to do so. If your organization is providing a match, identify the expenses under the Matching Funds column and identify the source of those funds.

#### **1. Project Information**

- Project Number – Leave blank (assigned by area board)
- Project Name – Must be identical to the project name on the Project Data Sheet and Project Narrative.

### **Attachments**

Include Attachments 1 –5:

1. Continuation of Funding Verification
2. Letters of Support
3. Organizational Chart
4. Duty Statements/CV
5. Previous Grants

# PROJECT DATA SHEET

## 1. Applicant Information

Project Number: <i>(Assigned by Council)</i>		
Application Number: <i>(Assigned by Council)</i>		
Project Name <i>(55 characters)</i> :		
Organization Name:		
Organization Website:		
Organization Address:		
Organization City/State:		
Organization Zip Code:		
Taxpayer ID Number:		
Project Period: <i>(Month /Day/Year)</i>	Start Date	End Date
Council Member: <i>(Assigned by Council)</i>		
Council Staff: <i>(Assigned by Council)</i>		

## 2. Project Information

(Choices are: Non-profit, School District, County, Government Corporation, Tribal Government, For-profit, City / Town, State, Special or Regional Authority, State P & A Agency, University Center, or Other)

Type of Applicant:	
Type of Project: <i>(Assigned by Council)</i>	

## 3. Project Funding Formula

TOTAL PROJECT COSTS	COUNCIL FUNDS	APPLICANT MATCHING FUNDS
	Amount: \$0.00 Percentage:	Amount:\$0.00 Percentage:
Grant Type (Poverty or Non-Poverty)		

## 4. Contact Information:

Name of Project Director:	
Title:	
Telephone:	
Fax:	
Email:	

☐ Check if Same as Project Director

Name of Financial Officer:	
Title:	
Telephone:	
Fax:	
Email:	

## 5. Signatory Authority:

☐ Check if same as Project Director

Name of Organization Director:	
Title:	
Telephone:	
Fax:	
Email:	
Date:	

## Project Outline

1. Provide a one paragraph abstract that clearly states the goal and major activities of the proposed project and the impact it will have on people with developmental disabilities.
2. Describe your organization's qualifications to implement the proposed project.
3. Provide a detailed narrative about the proposed project, including specific information on the methodology to be used and an overview of project activities.
4. What are the major expected accomplishments of the project, and how will successful completion of the project impact people with developmental disabilities?
5. Has this proposal been submitted to any other Area Board for potential funding during this cycle? If yes, please list the additional Area Board:

Please note: This document will be posted to the SCDD/Area Board website(s). Every applicant will submit this form along with the proposed budget pages which will become the grant application. Once completed the applicant will print out the documents and mail the hard copy to the appropriate Area Board.

4100 - State Council on Developmental Disabilities  
Grant Budget Detail Sheet  
October 1, 2012 thru September 30, 2013

<u>Category of Expense</u>	<u>SCDD Grant Funds</u>	<u>Other Funds</u>	<u>Total Project Costs</u>
<b>Salaries and Wages</b>			
1)	\$0	\$0	\$0
2)	\$0	\$0	\$0
3)	\$0	\$0	\$0
4)	\$0	\$0	\$0
<b>Subtotal Salaries and Wages</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Fringe Benefits</b>	\$0	\$0	\$0
<b>Consultant / Subcontracted Services</b>			
1)	\$0	\$0	\$0
2)	\$0	\$0	\$0
3)	\$0	\$0	\$0
<b>Subtotal Consultant / Subcontracted Services</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Travel</b>	\$0	\$0	\$0
<b>Office Supplies</b>	\$0	\$0	\$0
<b>Printing</b>	\$0	\$0	\$0
<b>Space Occupancy / Rent</b>	\$0	\$0	\$0
<b>Equipment</b>	\$0	\$0	\$0
<b>Other Costs (Specify)</b>	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
<b>Totals</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>